Betty J. Simkins, Ph.D.

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EDUCATION

Ph.D., Case Western Reserve University, 1997, Major field of study: Finance, Dissertation: "Two Essays on Risk Management", Chairs: Peter Ritchken and Paul Laux
M.B.A., Oklahoma State University, 1983, Major field of study: Finance
B.S., University of Arkansas, 1980, Major field of study: Chemical Engineering

ACADEMIC EXPERIENCE

Oklahoma State University, Williams Companies Chair (2014-present), Williams Companies Professor of Business (2007-2013), Professor (2009-present); Associate Professor (2002-2009), Assistant Professor (1997-2002)
University of Texas-Austin (Fall 2014; spent part of Fall 2014 sabbatical with Department of Finance)
Università degli Studi di Bergamo (Italy), Visiting Professor in Advanced Corporate Finance (March 2013)
Trinity College Dublin (Ireland), Visiting Professor in Enterprise Risk Management (2009-2014)
Technologico de Monterrey, Chihuahua Campus (Mexico), Visiting Professor in International Finance (January and February 2010 and November 2010)
Justus-Liebig University Giessen (Germany), Visiting Professor in International Finance (Dec. 2001)
Case Western Reserve University, Department of Banking and Finance, Lecturer (1992-1997)
University of Texas at San Antonio, Department of Econ. and Finance, Teaching Associate (1988-1990)
Wayland Baptist University, San Antonio, Instructor (1988-1990)
Northeastern State University (University Center at Tulsa), Lecturer (1985-1988)
Tulsa Junior College, Lecturer (1985-1987)

NON-ACADEMIC EXPERIENCE

Simkins Consulting (1996-current)
MedSource Corporation, Teleconference Network (1986-1988), Program Coordinator
The Williams Companies (1983-1985), Financial Analyst and Process Engineer
Conoco, Inc. (1980-1982), Chemicals Research and Development, Engineer

PUBLICATIONS AND RESEARCH

Publications:

"OTC vs. Exchange Traded Derivatives and Their Impact on Hedging Effectiveness and Corporate Capital Requirements", with Ivilina Popova, *Journal of Applied Corporate Finance*, Vol. 27 (No. 1), 2015, 63-70.

"Economic Value of OTC Derivatives used by Nonfinancial Firms: Panel Session from the 2014 Applied Finance Conference", with Audrey Costabile Blater, Charles Cerria, Eric Hughson, and Robert Selvaggio, *Journal of Applied Finance*, Vol. 24 (No. 2), 70-86.

“Exposure, Hedging, and Value: New Evidence from the U.S. Airline Industry”, with David A. Carter, Daniel A. Rogers, and Stephen Treanor, *International Review of Financial Analysis*, Vol. 34, 2014, 200-211.

“Does Operational and Financial Hedging Reduce Exposure? Evidence from the US Airline Industry”, with David A. Carter, Daniel A. Rogers, and Stephen Treanor, *Financial Review,* Vol. 49 (No. 1), 2014, 149-172.

“From Psychology, Law, Accounting and Economics: Measuring the Influence of Finance Journals in the Social Sciences” with Kenneth Borokhovich and Allissa Lee, forthcoming in the *Journal of Financial Education.*

“Operational and Financial Hedging: Friend or Foe? Evidence from the U.S. Airline Industry”, with Dave Carter, Daniel A. Rogers, and Stephen Treanor, forthcoming in *The Journal of Accounting and Finance.*

“Options on Troubled Stock” with Antonio Camara and Ivilina Popova, *Journal of Futures Markets,* July 2014.

“Diversification Revisited” with Kris Kemper and Allissa Lee, *Research in International Business and Finance*, Vol. 26, 2012, 304-316.

“A Comparative Study of the Probability of Default for Global Financial Firms” with Antonio Camara and Ivilina Popova, *Journal of Banking and Finance*, Vol. 36 (Issue 3), 2012, 717-732.

“A Framework for Journal Assessment: The Case of the Journal of Banking and Finance,” with Kenneth Borokhovich and Allissa Lee, *Journal of Banking and Finance*, Vol. 35 (Issue 1), 2011, 1-6 (lead article).

“FX Risk-Neutral Valuation Relationships for the S_u Jump-Diffusion Family”, with Ana Camara, Antonio Camara, and Ivilina Popova, *International Journal of Finance and Economics*, Vol. 13, 2011, 339-356.

“Total Risk Evaluation for Capital Budgeting: Panel Discussion”, with Stephen Brod, Sven Salchow, Martin Glaum, and Ameeta Jaiswal-Dale, *Journal of Applied Finance*, Vol. 21 (Issue 1), 2011.

“The Diversity of Corporate Board Committees and Financial Performance” with David A. Carter, Frank D’Souza, and W. Gary Simpson, *Corporate Governance: An International Review*, September 2010, Vol. 18 (Issue 5), 396-414.

“Analyst Forecast Performance and Price Discovery in a Futures Market: The Case of Natural Gas Storage” with Gerald D. Gay and Marian Turac, *Journal of Futures Markets*, Vol. 29 (No. 5), 2009, 451-477.

“Who Reads What Most Often? A Survey of Enterprise Risk Management Literature Read by Risk Executives” with John R.S. Fraser and Karen Schoening-Thiessen, *Journal of Applied Finance* Vol. 18 (No. 1, Spring/Summer), 2008, 73-91.

“Enterprise Wide Risk Management and Corporate Governance” with Steven A. Ramirez, *Loyola University Chicago Law Journal* Vol. 39 (No. 3, Spring), 2008, 571-594.

“Enterprise Risk Management: Current Initiatives and Issues -- *Journal of Applied Finance* Roundtable”, Panelists: Bruce Branson, Pat Concessi, John Fraser, Michael Hofmann, Robert Kolb, Todd Perkins, and Joseph Rizzi; Moderated by Betty Simkins, *Journal of Applied Finance* Vol. 18 (No. 1, Spring/Summer), 2008, 115-132.

"Ten Common Misconceptions About Enterprise Risk Management" by John R.S. Fraser and Betty J. Simkins, *Journal of Applied Corporate Finance* Vol. 19 (No. 4), 2007, 75-81.

“Hedging and Value in the US Airline Industry” with David A. Carter and Daniel A. Rogers, *Journal of Applied Corporate Finance* Vol. 18 (No. 4), 2006, 31-43.

“Does Hedging Affect Firm Value? Evidence from the US Airline Industry” with David A. Carter and Daniel A. Rogers, *Financial Management* Vol. 35 (No. 2, Spring), 2006, 53-86. (Awarded the Addison-Wesley Best Paper in *Financial Management* during 2004-2006)

“Asymmetric Information and Credit Quality: Evidence from Synthetic Fixed-Rate Financing” with Daniel A. Rogers, *Journal of Futures Markets* Vol. 12 (No. 6), 2006, 595-625. (Earlier version of paper awarded FMA Competitive Paper Award in Corporate Finance and SFA Outstanding Doctoral Student Paper Award)

“Does Risk Management Add Value? A Survey of the Evidence” with Charles Smithson, lead article in journal, *Journal of Applied Corporate Finance* Vol. 17 (No. 3), 2005, 8-17.

“The Rise and Transformation of the Chief Risk Officer: A Success Story on Enterprise Risk Management” with Tom Aabo and John R.S. Fraser, *Journal of Applied Corporate Finance* Vol. 17 (No. 3), 2005, 18-31.

“Interaction Between Real Options and Financial Hedging: Fact or Fiction in Financial Decision-Making” with Tom Aabo, *Review of Financial Economics* Vol. 14, 2005 Special Issue on Real Options, 353-369.

"The Interaction Between Real Options and Financial Hedging in Non-financial Firms" with Tom Aabo, *Journal of Financial Transformation*, Vol. 13 (April), 2005, 68-72.

“The Market’s Reaction to Unexpected, Catastrophic Events: The Case of Airline Stock Returns and the September 11th Attacks” with David A. Carter, *Quarterly Review of Economics and Finance* Vol. 44 (No. 4, Fall), 2004, 539-558.

“Board Composition and Corporate Use of Interest Rate Derivatives” with Kenneth Borokhovich, Kelly Brunarski, and Claire Crutchley, *Journal of Financial Research*, Vol. 27 (No. 2, Summer), 2004, 199-216.

“Evidence on Voluntary Disclosures of Derivatives Usage by Large US Companies” with Raj Aggarwal, *The Journal of Derivatives Accounting*, Vol. 1 (No.1), 2004, 61-81.

“Southwest Airlines: The Blended Winglet Project” with Aaron Martin and Daniel A. Rogers, *Case Research Journal* Vol. 24 (Summer/Fall), 2004, 23-33 (Published by the North American Case Research Association).

“Corporate Governance, Board Diversity, and Firm Value" with David A. Carter and W. W. Gary Simpson, *Financial Review*, Vol. 38, 2003, 33-53. Abstracted in the *CFA Digest*, Vol. 3 (No. 3, August),

2003. This paper is the most highly cited paper in *Financial Review* over the 3 year period 2005-2007 based on tabulations by Blackwell Publishers in CrossRef, was the top downloaded paper in 2004, and has been in the "top 10" of download papers in *Financial Review* for each year 2005 through 2007.

"The Impact of Accounting Research on Finance" with Kenneth Borokhovich and Robert Bricker, *Critical Perspectives on Accounting,* Vol. 14 (May), 2003, 417-438.

"The Retrospective Life Insurance Method: A Pedagogic Spreadsheet Application" with David R. Lange, *Advances in Financial Education* Vol. 1 (Fall), 2003, 41-64.

"An Empirical Framework and Teaching Note for Introducing Financial Management in the First MBA Core Class" with Paul Laux, lead article in *Journal of Financial Education*, Vol. 28 (Fall/Winter), 2002, 1-27.

"Operational Hedges and the Foreign Exchange Exposure of US Multinational Corporations" with Paul Laux and Christos Pantzalis, *The Journal of International Business Studies*, Vol. 32 (No. 4, December), 2001, 793-812,

"An Extension of Cherry's (2000) 'Calculating Funding Premiums for Universal Life Insurance" with David R. Lange, *North American Actuarial Journal,* Vol. 5 (No. 3, July), 2001, 118-123.

"Integration of Operational and Financial Hedges in Currency Risk Management" with David Carter and Christos Pantzalis, *FSR Forum* (a publication of Financial Study Association Rotterdam), lead article and invited submission, Vol. 3 (No. 5, August), 2001, 6-14.

"Open-Book Management: Optimizing Organization Human Capital" with Raj Aggarwal, *Business Horizons* (September-October), 2001, 5-13.

"How Do US Multinational Corporations Manage Their Foreign Exchange Rate Exposure? An Empirical Analysis" with Paul Laux and Christos Pantzalis, lead article in *Corporate Finance Review,* May/June, 2000, 5-14.

"An Analysis of Finance Journal Impact Factors" with Kenneth Borokhovich and Robert Bricker, *The Journal of Finance,* Vol. 55 (No. 3, June), 2000, 1457-1469.

"An Innovative Approach to Teaching Futures: A Participatory Futures Trading Simulation" with Peter Alonzi and David R. Lange, *Financial Practice and Education*, Vol. 10 (No. 4, Spring/Summer), 2000, 228-238. (Awarded the 1998 FMA Competitive Paper Award for Innovations in Teaching Finance)

"A Retrospective Evaluation of *Financial Practice and Education* over 1991-1999" with David A. Carter, *Financial Practice and Education,* Vol. 10 (No. 4, Spring/Summer), 2000, 153-165.

"*Financial Management's* Success as an Academic Journal" with Kenneth Borokhovich and Robert Bricker, *Financial Management,* Vol. 28 (No. 3, Autumn), 1999, 76-82.

"Finance Research Productivity and Influence by Topic Area" with Kenneth Borokhovich, Kelly Brunarski and Robert Bricker, *Journal of Financial Education,* Vol. 24 (Spring), 1998, 8-20.

"The International and Geographic Distribution of Authorship in Finance Research" with Kenneth Borokhovich, Kelly Brunarski and Robert Bricker, *Financial Practice and Education*, Vol. 8 (No. 1), 1998, 41–50.

"Finance Research Productivity and Influence" with Kenneth Borokhovich, Kelly Brunarski and Robert Bricker, *The Journal of Finance*, Vol. 50, 1995, 1691–1717.

"Journal Communication and Influence in Financial Research" with Kenneth Borokhovich and Robert Bricker, *The Journal of Finance*, Vol. 49, 1994, 713–725.

"The Streams of Financial Research and Their Interrelationships: Evidence from the Social Sciences Citation Index" with Kenneth Borokhovich and Robert Bricker, *Financial Practice and Education*, Vol. 4, 1994, 110–123.

Publication of Books, Book Chapters, and Prefaces in Books:

Book: *Implementing Enterprise Risk Management: Case Studies and Best Practices*, Co-Edited with John R.S. Fraser and Kristina Narvaez, John Wiley & Sons, Inc., 2014. Also being translated into Korean. Book chapters I have co-authored:

- Chapter 1: Enterprise Risk Management Case Studies: An Introduction and Overview, with John Fraser and Kristina Narvaez
- Chapter 2: An Innovative Method to Teaching Enterprise Risk Management: A Learner Centered Teaching Approach, with David Lange
- Chapter 24: The Role of VaR in Enterprise Risk Management: Calculating Value-at-Risk for Portfolios Held by the Vane Mallory Investment, with Allissa Lee

Forthcoming book chapter: "Energy Futures Markets", with Yuecheng Jia, *The WSPC Handbook of Futures Markets*, Co-Edited by A.G. Malliaris and William T. Siemba. World Scientific Handbook in Financial Economics Series.

Preface in *Perspectives on Energy Risk*, CEVI, Co-Edited by André Dorsman, Timur Gök and Mehmet Baha Daran, forthcoming in 2014.

Book: *Energy Finance and Economics: Analysis and Valuation, Risk Management, and the Future of Energy*, Co-Edited with Russell E. Simkins, John Wiley & Sons, Inc., 2013. Also translated into Chinese and Arabic. Book chapters I have co-authored:

- Chapter 1: Introduction to Energy Finance and Economics, with Russell Simkins
- Chapter 3: Energy Economics: Past, Present and Prospects for the Future, with James Williams
- Chapter 9: Financial Statement Analysis of Oil and Gas Companies and Competitive Benchmarking, with Siamak Javadi Asl and Mary Wicker
- Chapter 11: Real Options and Applications in the Energy Industry, with Kris Kemper
- Chapter 16: Introduction to Energy Risk Management, with Ivilina Popova
- Chapter 21: Financial Analysis of the Purchase of a Hybrid Consumer Vehicle, with Don Chance and Pratik Dhar
- Chapter 22: ExxonMobil Corp.'s Acquisition of XTO Energy, Inc.: An Exercise in Valuation, with Allissa Lee

Book chapter: "Does Hedging Reduce Economic Exposure? Hurricanes, Jet Fuel Prices, and Airlines", with David Carter, Daniel Rogers, and Stephen Treanor, in *Handbook of Research Methods and Applications in Empirical Finance*, 2013, Editors: Adrian Bell, Chris Brooks and Marcel Prokopczuk, Edward Elgar Publishing Ltd.

Book: *Enterprise Risk Management: Today's Leading Research and Best Practices for Tomorrow's Executives*, Co-Edited with John R.S. Fraser, John Wiley & Sons, Inc., 2010. Translated into Korean. Book chapters authored:

- Chapter 1: Enterprise Risk Management: An Introduction and Overview, with John Fraser
- Chapter 23: Academic Research on Enterprise Risk Management, with Subbu Iyer and Dan Rogers

Book chapter: Chapter 36: Real Options in Corporate Finance, with Kris Kemper, in *Financial Derivatives: Pricing and Risk Management*, Editors: Robert W. Kolb and James A. Overdahl, 2010. Reprinted in *Energy Finance and Economics: Analysis and Valuation, Risk Management, and the Future of Energy* as "Chapter 11: Real Options and Applications in the Energy Industry" with Betty J. Simkins , John Wiley & Sons, Inc., 2013.

Book chapter: "Board Diversity and Firm Performance" with David A. Carter and W. W. Gary Simpson, J. Batten and T. Fetherston (eds.), *Research in International Business and Finance,* Amsterdam: Elsevier, 2003, 49-70.

Mini-cases "Valuing ConocoPhillips' Acquisition of Burlington Resources", "ConocoPhillips Gas Acquisition Project", and "Southwest Airlines Winglet Project", in *Valuation: The Art & Science of Corporate Investment Decisions*, 1st and 2nd Editions, 2008 and 2011, Pearson.

Other Publications:

"Understanding Value-at-Risk to Avoid Risk Management Breakdown", with Allissa Lee, *Risk Watch*, a Conference Board of Canada publication, April 2014, 15-19.

"Strategy to Implement Enterprise Risk Management Programs at Colleges and Universities"' *College & University Auditor* Fall 2013, 14-17 (http://issuu.com/ampinc/docs/acua_candu_journal_fall_13_final).

"The Energy Renaissance and U.S. Energy Policy", *Vanguard* 2013, 28-29 (http://research.okstate.edu).

"Does Gender Diversity on the Board of Directors Improve Risk Governance?", with Ilene H. Lang and Heather Foust-Cummings, *Risk Watch*, a Conference Board of Canada publication, January 2012, 14-17.

"Enterprise Risk Management: A Review of Prevalent Practices", with Joseph Rizzi and Karen Schoening-Thiessen, Conference Board of Canada Research Report, January 2011, Publication 11-165.

"Improving the Value of Enterprise Risk Management to Help Manage Corporate Reputation", with Daniel A. Rogers and Karen Schoening-Thiessen, Conference Board of Canada Research Report, October 2010, Publication 11-085.

Interview: "Interview with Myron S. Scholes: 1997 Nobel Laureate in Economic Sciences", with Charles Smithson, *Journal of Applied Finance*, Vol. 19 (No. 1 & 2), 2009, 129-135.

Interview: "Pioneers in Finance: Vernon Smith Interview", with Terrance Odean, *Journal of Applied Finance*, Vol. 18 (No. 2), 116-123.

"Where to Look: Comparing Research Records for Tenure and Promotion" with Kenneth Borokhovich and John Borokhovich", *FMA Online*, Fall 2007.

“Journal Influence: Impact Factors” with Kenneth Borokhovich and John Borokhovich, *FMA Online*, Spring 2007.

“Roundtable on Current Issues Related to Enron and Arthur Anderson” with John Finnerty, Julia Grant, Robert Jensen, and Rebecca McEnally, *FMA Online*, Spring 2002.

Proceedings (Competitive/Peer-Reviewed):

“Asymmetric Exposure to Foreign-Exchange Risk: Financial and Real Option Hedges Implemented by U.S. Multinational Corporations” with David A. Carter and Christos Pantzalis, *Proceedings of the Assurant/Georgia Tech Tenth International Finance Conference*, 2004.

“Firmwide Risk Management of Foreign Exchange Exposure by U.S. Multinational Corporations” with David A. Carter and Christos Pantzalis, *Proceedings of the Seventh International Finance Conference*, Georgia Tech, 2001.

“Derivatives Use and the Exchange Rate Risk of Large U.S. Corporations” with Paul Laux, *Proceeding of the Chicago Risk Management Conference*, 1998; *Proceedings of the Second International Finance Conference*, Georgia Tech, 1996; *Proceedings of the International Association of Financial Engineers*, 1996; *Proceedings of the Annual Meeting of the Chicago Board of Trade Fall Research Seminar*, 1996.

Working Papers/Research in Progress:

[Note: On April 1, 2015 I ranked 331 out of over 209,000 authors on SSRN based on a total of over 32,481 downloads of my working papers. I have 258 citations of my working papers on SSRN. My SSRN Working Papers are available at http://papers.ssrn.com/author=15921. I have 3392 citations on Google Scholar.]

“The Microeconomics and Value of Non-Cleared OTC Derivatives: Case Study Analyses of Hedges by Publicly Traded Nonfinancial Firms”, ISDA working paper, with Ivilina Popova

"Efficient Socially Responsible Portfolios" with Ivilina Popova and Jot Yau

“The Market’s Reaction to Unexpected, Catastrophic Events: The Case of Oil and Gas Stock Returns and the Gulf Oil Spill”, with David A. Carter and Phillip Humphrey

“Zombie Oilfields: Economic Analysis of Eagle Ford Shale”, with Brian Hoppe

“The Corporate Finance Research Environment” with Kenneth Borokhovich and Allissa Lee

“Determinants of Top Management Compensation: The Case of NCAA Football Head Coaches”, with Phillip Humphrey and Jacqueline Garner

“Stock Returns, Higher Moments, and CSR Factors”, with Yuecheng Jia and Ivilina Popova

“Jet Fuel Hedging in the Airline Industry: The Case of Southwest Airlines” with David A. Carter and Daniel A. Rogers

“Universal Life Insurance Duration Measures”, with David Lange and Peter Alonzi

Research in Progress: MLPs in the energy industry, with Sheridan Titman and Susan Chaplinsky.

Research in Progress: Citation analysis of the *Journal of Futures Markets* with Ken Borokhovich and Alex Boquist

RESEARCH GRANTS AND CONTRACTS

External:

Research Grant by the International Swaps Dealers Association (ISDA) to investigate the Economic Value of Non-Cleared Derivatives, with Ivilina Popova, Award Amount: $15,000, 2013-2014.

Note about Abbreviations: Annual meeting and association abbreviations used in my vita are as follows: AFA (American Finance Association), EFA (Eastern Finance Association), FMA (Financial Management Association), FMA Euro (Financial Management Association European meeting), SFA (Southern Finance Association), SRIA (Southern Risk and Insurance Association), SWFA (Southwest Finance Association), WFA (Western Finance Association).

HONORS AND AWARDS

Research:

Richard W. Poole Research Excellence Award, 2008, 2009, 2010, 2011, 2012, 2013

Regents Distinguished Research Award at Oklahoma State University, 2010

Best Paper Award in Risk Management at the 2007 FMA Meeting for "Valuing Options when Shareholders Face Bankruptcy Risk"

Addison-Wesley Best Paper in *Financial Management* for "Does Hedging Affect Firm Value? Evidence from the US Airline Industry", 2006

Spears School of Business Dean's Award for the published paper: "Does Hedging Affect Firm Value? Evidence from the US Airline Industry", 2006

Spears School of Business Dean's Award for the published paper: "Asymmetric Information and Credit Quality: Evidence from Synthetic Fixed-Rate Financing", 2005

Best Paper Award in Innovations in Teaching Finance at the 1998 FMA Meeting for "An Innovative Approach to Teaching Futures: A Participatory Futures Trading Simulation"

Best Paper Award in Corporate Finance at the 1997 FMA Meeting for "Asymmetric Information, Credit Quality and the Use of Interest Rate Derivatives"

Outstanding Doctoral Student Paper Award at the 1997 SFA Meeting for "Asymmetric Information, Credit Quality and the Use of Interest Rate Derivatives"

Citation from the State of Oklahoma for Outstanding Achievements, 1997

Teaching, Service, and Other:

OSU Outreach Faculty Excellence Award, 2013

Richard W. Poole Outreach Excellence Award, 2013

Top 50 MBA Graduate, Oklahoma State University, 2011

Appointed to the Strategic Risk Council Advisory Committee, Conference Board of Canada, 2009 to present (Note: First non-Canadian and first academic to be appointed to this committee)

OSU Business Student Council Faculty of the Month, November 2008

Arkansas Academy of Chemical Engineers, Inducted in April 2006 (Honorary organization for distinguished chemical engineering graduates)

Technology Innovator Award from OSU Office of Academic Affairs and the Information Technology Division, 2004

Advisor Leadership Award from OSU Campus Life Leadership Recognition Program (2004) for advising the Financial Management Association Student Chapter

Outstanding MBA Faculty Award, 2002

Regents Distinguished Teaching Award, 2001

Merrick Foundation Teaching Award, 2001

Chandler-Frates and Reitz Teaching Excellence Award for Outstanding MBA Teacher of the Year at OSU-Tulsa campus, 1999

OSU Business Student Council Faculty of the Month, December 1997

Financial Management Association Doctoral Student Seminar, 1996

PRESENTATIONS

Keynote Presentations:

"Enterprise Risk Management and Executive Education: Embedding Enterprise Risk Management Across the Organization", Global Enterprise Risk Management Online Symposium, November 2013, SiSCUSS, website: http://www.erm.siscuss.com/.

"Enterprise Risk Management in the Energy Industry: Today's Best Practices - Inspiration to Enhance Future Value which Includes Other Industries", PolRisk Conference, Warsaw, Poland, November 21, 2012.

"What's Wrong with Corporate Risk Management and Implications for Research in Finance, European Working Group on Financial Modeling 43rd Conference (EWGFM), held at City University, Cass Business School, London, September 2008.

Invited University or Specialty Conference Presentations:

Featured speaker, Deloitte Energy and Resources Executive Dinner Roundtable "Innovative Perspectives on Managing Financial and Operational Risk", held on March 5, 2015, Oklahoma City.

"Selected Topics in Risk Management", Energy Finance class at University of Texas-Austin, McCombs School of Business, October 2014.

"Financial Trends in the U.S. Midstream Industry: Spinoffs, MLPs, and Shareholder Value", presentation; Panel Moderator: "Natural Gas Supply and Demand"; Panelist: Current Challenges and Opportunities in Risk Management: Natural Gas, Midstream and Marketing, and Crude", at the 2014 OSU Energy Midstream and Marketing Program, October 1-3, 2014.

"Financial Trends in the U.S. Midstream Industry: Spinoffs, MLPs, and Shareholder Value", presentation at the Natural Gas and Energy Association Annual Conference (NGEAO), September 10, 2014.

"Managing Enterprise Reputation through Risk Management", 4th Enterprise Risk Management Conference MENA 2014, June 2-4, 2014, Dubai, http://www.erm-mena.com/.

"Unconventional Oil and Gas Finance Best Practices and Strategies", presented at the unconventional Finance Executive Roundtable, A Forum Hosted by Accenture and Saudi Aramco, Houston, May 29, 2014.

"The Value of OTC Derivatives: Case Study Analyses of Hedges by Publicly Traded Non-Financial Firms", The Social and Economic Value of Derivatives and Finance Panel Session, 2014 Annual Meeting of the International Swaps and Derivatives Association, Inc (ISDA), Munich, April 9, 2014.

"The Microeconomics and Value of Non-Cleared OTC Derivatives: Case Study Analyses of Hedges by Publicly Traded Nonfinancial Firms", Concordia University, March 21, 2014.

"Value Creation in the Energy Value Chain", Council of Petroleum Accountants Societies (COPAS), Oklahoma City, February 20, 2014.

"The Microeconomics and Value of Non-Cleared OTC Derivatives: Case Study Analyses of Hedges by Publicly Traded Nonfinancial Firms", University College Dublin, Center for Financial Studies, February 13, 2014.

"Enterprise Risk Management in Corporate Strategy and the Role of the Chief Risk Officer", Money Matters Club at IBS Hyderabad, India, January 8, 2014.

Panelist Speaker: "CEPD 60th Anniversary", Oklahoma State University, November 7, 2013.

"Financial Trends in the U.S. Midstream Industry: Spinoffs, MLPs and Shareholder Value", OSU Midstream and Marketing Conference, December 4-6, 2013.

Panelist Speaker: "The Effectiveness of Women on a Board of Directors", Mississippi State University, September 13, 2013

"Strategies to Maximize Value in the Global Oil and Gas Industry Value Chain", Council of Petroleum Accountants Societies (COPAS) Education Day, June 27, 2013.

Panelist Speaker: "Enterprise Risk Management: Creating a Framework for Energy Firms", Global Association of Risk Professionals (GARP) Annual Conference, March 13, 2013.

Speaker: “The Energy Renaissance and Implications for U.S. Energy Policy”, Case Western Reserve University, Great Lakes Energy Institute, November 15, 2012.

Panelist Speaker: Conference: “Managing Risk in a Complex World”, University of Washington School of Law, Seattle, Washington, October 5, 2012.

“Current Risks in Energy Finance and Economics”, Oklahoma State University’s Sixth Annual Energy Conference, Oklahoma City, April 2012.

“Hot Topics in Energy Finance and Economics”, 2011 Professional Forum, PricewaterhouseCoopers, Tulsa, December 2, 2011.

Panelist Speaker: Conference: “Women Board Directors’ Influence on Corporate Governance, Firm Performance, Economies, and Societies”, hosted by Catalyst, Toronto, September 21-23, 2011.

“Research Report: Capturing the Benefits of ERM”, presented at the Conference Board of Canada Conference: Investment Industry Enterprise Risk Management: Answering the Wake-Up Call”, Toronto, February 9, 2011.

Panelist Speaker: Conference: “Closing the Global Gender Gap: The Business Case for Organizations, Politics and Society”, hosted at Harvard University (Kennedy School), in collaboration with the Council of Women World Leaders and the World Economic Forum, October 15 and 16, 2010.

“A Clinical Study of the Probability of Default for Global Financial Firms Impacted by the Subprime Crisis” at Yuanze University (Taiwan), May 2010.

“Regime Dependency of Exposure Coefficients and Hedging Behavior in the U.S. Airline Industry” at National Chengchi University (Taiwan), May 2010.

“A Clinical Study of the Probability of Default for Global Financial Firms Impacted by the Subprime Crisis”, presented at St. John’s University (Queens, New York), December 10, 2009.

“Enterprise Risk Management”, presented at Loyola University Chicago, April 8, 2009. Also interviewed as part of interview series on “Conversations in Risk Management and Corporate Governance”. The interview can be viewed at: http://www.luc.edu/gsb/riskcenter/video_interview_series.shtml.

“An Analysis of the Implied Probability of Bankruptcy for Chapter 11 Firms, Global Banks and Materials and Construction Firms Impacted by the Subprime Crisis”, presented at Ryerson University (Toronto, Canada), February 12, 2009.

“An Analysis of the Implied Probability of Bankruptcy for Chapter 11 Firms, Global Banks and Materials and Construction Firms Impacted by the Subprime Crisis” with Antonio Camara and Ivilina Popova, presented at Wilfrid Laurier University (Waterloo, Ontario), November 14, 2008.

“Ten Common Misconceptions About Enterprise Risk Management” with John R.S. Fraser, presented at North Carolina State University, December 2007.

“Asymmetric Information and Credit Quality: Evidence from Synthetic Fixed-Rate Financing” with Daniel A. Rogers, presented at the University of Arkansas, April 2005.

"Analyst Forecast Performance and Price Discovery in a Futures Market: The Case of Natural Gas Storage" with Gerald D. Gay and Marian Turac, presented at the University of Oklahoma, November 2004.

"Does Fuel Hedging Make Economic Sense? The Case of the U.S. Airline Industry" with David A. Carter and Daniel A. Rogers, presented at the University of Kansas (March 2004) and Kent State University, September 2003.

"Corporate Risk Management of U.S. Multinational Corporations: Financial and Operational Hedges and Foreign Exchange Exposure" with David A. Carter and Christos Pantzalis, presented at Justus-Liebig University Giessen, Giessen, Germany, December 2001.

"Board Diversity and Shareholder Value" with David A. Carter and W. Gary Simpson, presented at Wichita State University, October 2001.

"Voluntary Disclosures of Derivatives Usage: Evidence and Determinants for U.S. Companies" with Raj Aggarwal, presented at Case Western Reserve University, May 1999.

Academic Conference Presentations:

"The Value of OTC Derivatives: Case Study Analyses of Hedges by Publicly Traded Non-Financial Firms", with Ivilina Popova, 2014, EFA.

"Recent Trends and Research Issues in the Area of Risk Management", Doctoral Student Seminar at the ICBF 2014 Conference, IBS Hyderabad, January 8, 2014.

"The Corporate Finance Research Environment" with Kenneth Borokhovich and Allissa Lee, 2013 FMA.

"Efficient Socially Responsible Portfolios" with Ivilina Popova and Jot Yau, 2013 EFA.

"Employee Benefit and Retirement Planning - A Learner-Centered Teaching Approach" with David Lange, 2013 Academy of Economics and Finance (Proceedings).

"Operational and Financial Hedging: Friend or Foe? Evidence from the U.S. Airline Industry" with Stephen Treanor, Daniel Rogers, and David A. Carter, presented at the 2012 EFA and 2012 FMA Euro.

"Determinants of Top Management Compensation: The Case of NCAA Football Head Coaches" with Phillip Humphrey and Jacqueline Garner, to be presented at the 2012 EFA, 2012 FMA Euro, 2012 INFINITI Conference, and 2012 FMA.

"The Market's Reaction to Unexpected, Catastrophic Events: The Case of Oil and Gas Stock Returns and the Gulf Oil Spill" with David A. Carter and Phillip Humphrey, 2011 EFA and 2011 FMA.

"Options on Troubled Stock" with Ana Camara, Antonio Camara, and Ivilina Popova, presented at the 2010 EFA, 2011 FMA, and 2011 FMA Euro.

"Universal Life Insurance – Has It Always Simply Been a Question of Duration?" with Peter Alonzi and David Lange, presented at the 2011 Academy of Economics and Finance.

“Regime Dependency of Exposure Coefficients and Hedging Behavior in the U.S. Airline Industry” with Stephen Treanor, Dave Carter, and Dan Rogers, presented at the 2010 FMAEuro and 2010 FMA.

“A Clinical Study of the Probability of Default for Global Financial Firms Impacted by the Subprime Crisis” formerly titled “Valuing Options when Stockholders Face Bankruptcy Risk” with Antonio Camara and Ivilina Popova, presented at the 2009 EFA and the 2009 FMA Euro.

“Does Operational and Financial Hedging Reduce Exposure? Evidence from the US Airline Industry” with David A. Carter, Daniel A. Rogers, and Stephen Treanor, presented at the 2009 FMA.

“Jet Fuel Hedging in the Airline Industry: The Case of Southwest Airlines, Cases A and B” with David A. Carter, Daniel A. Rogers, and Stephen Treanor, presented at the 2009 FMA.

“Does Hedging Reduce Economic Exposure? Hurricanes, Jet Fuel Prices, and Airlines” with David A. Carter and Daniel A. Rogers, presented at the 2008 FMA.

“Valuing Options when Stockholders Face Bankruptcy Risk” with Antonio Camara, presented at the 2007 FMA, 2007 FMA Euro, 2008 MFA, 2008 EFA, and 2008 INFINITI Conference.

“The Gender and Ethnic Diversity of Corporate Board Committees and Financial Performance”, presented at the 2007 INFINITI Conference (Dublin), University of North Carolina – Chapel Hill (Law School), and 2008 FMA Euro.

“Asymmetric Exposure to Foreign-Exchange Risk and the Influence of Financial and Real Option Hedges” with David A. Carter and Christos Pantzalis, presented at the 2006 EFA and 2006 FMA Euro.

“Teaching Life Insurance by Design: Applied Life Insurance Illustrator -- ATRC”, with Steven T. Jones and David R. Lange, presented at 2006 SRIA and the Actuarial Teaching and Research Conference, University of Leeds, Leeds, UK, July 2007

“Applied Life Insurance Policy Illustrator: Lab Exercises” with Steven T. Jones and David R. Lange, 2006 SWFA Annual Meeting.

“Analyst Forecast Performance and Price Discovery in a Futures Market: The Case of Natural Gas Storage” with Gerald D. Gay and Marian Turac, presented at the 2005 EFA, 2005 FMA Euro, and the 2005 FMA.

“Fuel Hedging in the Airline Industry: The Case of Southwest Airlines” with David A. Carter and Daniel A. Rogers, presented at the 2004 FMA, 2005 EFA.

“Does Fuel Hedging Make Economic Sense? The Case of the U.S. Airline Industry” with David A. Carter and Daniel A. Rogers, presented at the 2004 AFA, 2001 FMA, 2002 EFA, University of Oregon (presented by co-author), 2003 FMA Euro.

“Asymmetric Exposure to Foreign-Exchange Risk: Financial and Real Option Hedges Implemented by U.S. Multinational Corporations” with David A. Carter and Christos Pantzalis, presented at the 2004 Assurant/Georgia Tech Tenth International Finance Conference, 2004 EFA, 2003 Real Options Conference (Washington D.C.), 2003 FMA, 2004 FMA Euro.

“An Applied Life Insurance Policy Illustrator” with David R. Lange, presented at the 2003 SRIA and the 2004 SWFA.

“The Market’s Reaction to Unexpected, Catastrophic Events: The Case of Airline Stock Returns and the September 11th Attacks” with David A. Carter, presented at the 2004 EFA and 2004 FMA Euro.

“The Retrospective Life Insurance Method: A Pedagogic Spreadsheet Application” with David R. Lange, presented at the 2002 FMA Annual Meeting, 2002 SRIA, 2003 EFA.

“Do Markets React Rationally? The Effect of the September 11th Attacks on Airline Stock Returns” with David A. Carter, presented at the 2002 SFA, 2003 EFA, 2003 FMA Euro.

“An Innovative Approach to Teaching Finance: Using Live Cases in the Case Course” presented at the 2001 FMA and the 2002 FEA.

“Board Diversity and Shareholder Value” with David A. Carter and W. Gary Simpson, presented at Wichita State University (October 2001), 2001 FMA, 2002 EFA, 2002 FMA Euro.

"UL Funding Premiums: A Flexible Spreadsheet Solution" with David R. Lange, presented by co-author at the 2001 Academy of Economics and Finance Annual Meeting.

“Corporate Risk Management of U.S. Multinational Corporations: Financial and Operational Hedges and Foreign Exchange Exposure” (new title: Firmwide Risk Management of Foreign Exchange Exposure by U.S. Multinational Corporations) with David A. Carter and Christos Pantzalis, presented at the 2000 FMA and 2001 EFA.

“Board Composition and Interest Rate Derivatives Usage” presented at the 2000 EFA and 1999 FMA.

“Voluntary Disclosures of Derivatives Usage: Evidence and Determinants for U.S. Companies” with Raj Aggarwal, presented at the 1999 FMA, 2000 EFA.

“Operational and Financial Hedges and the Foreign Exchange Exposure of Multinational Corporations” with Paul Laux and Christos Pantzalis, presented at the 1999 EFA, 1999 FMA, 1999 SFA.

“Market Outcry Versus Electronic Trading: Financial Intuition or Pedagogy?” with Peter Alonzi, Tom Gosnell, and David R. Lange, presented at the 1999 FMA.

“Open-Book Management: A Case Study of Manco Inc.” with Raj Aggarwal, presented at the 1999 EFA and the 2000 FMA.

“Asymmetric Information, Credit Quality and the Use of Interest Rate Derivatives” presented at the 2002 EFA, 1998 WFA, 1998 Southwest Finance Symposium, 1997 FMA, 1997 SFA.

“Derivatives Use and the Exchange Rate Risk of Investing in Large U.S. Corporations” with Paul Laux, presented at the 1997 FMA and 1997 SFA.

“Managerial Incentives, Monitoring and the Use of Derivatives” with Kenneth Borokhovich, Kelly Brunarski, and Claire Crutchley, presented at the 1997 SFA and 1998 FMA.

“An Innovative Approach in Teaching Futures: A Participatory Futures Trading Simulation” with Peter Alonzi and David R. Lange, presented at the 1998 FMA and 1998 SFA.

“The Structure of Financial Research” presented at the 1994 EFA.

Special Session Presentations:

“Enterprise Risk Management in Practice”, Panelist, 4th Enterprise Risk Management Conference MENA 2014, June 2-4, 2014, Dubai

“Economic Value of OTC Derivatives used by Nonfinancial Firms”, Moderator of panel session at the Applied Finance Conference held on May 16, 2014 in NY.

“How (and why) Should Finance Faculty Teach Risk Management to Business School Students?”, Panelist, EFA 2011.

“Total Risk in Capital Budgeting”, Moderator, 2010 FMA Euro.

“Enterprise Risk Management: Current Initiatives and Issues - *Journal of Applied Finance* Roundtable”, Moderator, 2007 FMA

“Journal Editors’ Roundtable”, Panelists, 2007 FMA

“Roundtable on Energy Finance”, Moderator and Panelist, 2007 INFINITI Conference (Dublin)

“Doctoral Student Seminar”, Panelist, 2007 FMA Euro

“Current Issues in Enterprise Risk Management”, Panelist, 2007 EFA

“Using Professional Service to Boost Your Career”, Panelist, 2006 FMA Women’s Networking Breakfast

“Enterprise Risk Management”, Special Session Panelist, 2006 FMA Euro

“Tips for Publishing from Finance Journal Editors”, Moderator, 2001 EFA

“Using Live Cases in the Case Course”, Special Session Panelist, 2000 EFA

“Recent Developments in Derivatives Disclosure Requirements and the Implications for Financial Managers”, Panelist, 1998 FMA

“Teaching Futures Using a Participatory Futures Trading Simulation”, Special Session Tutorial at the 1996 FMA, 1996 EFA, 1995 Chicago Board of Trade Seminar on Financial Futures for Educators, and 1994 SFA

Webinars:

“Strategy to Implement ERM at Colleges and Universities”, Webinar for MetricStream, October 9, 2012.

“Current Topics in Energy Finance and Economics”, Webinar for GARP (Global Association of Risk Professionals), March 15, 2012.

“Enterprise Risk Management”, with John Fraser, Webinar for Diana Del Bel Belluz with RiskWise, September 2010

"Capital Budgeting and Risk Analysis in the Oil Industry", Webinar for Crystal Ball (subsidiary of Oracle), December 19, 2007

"Estimating Bankruptcy Risk from Stocks and Options" with Antonio Camara, Webinar for PRMIA-Professional Risk Managers' International Association, December 5, 2007

EXECUTIVE TRAINING EXPERIENCE

"Enterprise Risk Management for Energy Companies", Euromoney, London, October 2014, forthcoming in Doha, Qatar, December 2014

"Masterclass: Advanced & Expert Strategies in Oil & Gas Finance and Accounting", Euromoney, London, September 2014

"Energy Finance and Economics", Chesapeake Energy, Oklahoma City, July, 2014

"Achieving Enterprise Risk Management Maturity: Benchmarking and Case Studies", two day workshop, 4th Enterprise Risk Management Conference MENA, Dubai, June 4-5, 2014

"Masterclass: Basic and Advanced Valuation and Corporate Investment Decisions for Maximizing Value in the Oil and Gas Industry", Euromoney, London, June 2014

"Unconventional Oil and Gas Reserves: The Basics, Financial Analysis, and Strategy", Saudi Aramco, Saudi Arabia, May 2014

"Energy Value Chain for Experienced Employees"; "Energy Value Chain" one day and three day courses (multiple times in Bartlesville and Houston) for Phillips66, 2013 and 2014

"Energy Value Chain" one day course (many times in Bartlesville and Houston), for ConocoPhillips, 2014 and forthcoming in 2015

"Energy Value Chain", Chesapeake Energy, Oklahoma City, April, 2014

"Masterclass: Advanced & Expert Strategies in Oil & Gas Finance and Accounting", Euromoney (London, September 2013; Hong Kong, October 2013; December 2014 Inhouse for KOGAS, Seoul)

"Advanced Valuation and Corporate Investment Decisions in the Oil and Gas Industry", Saudi Aramco, Saudi Arabia, June 2013

"Energy Value Chain", Saudi Aramco, Saudi Arabia, June 2013, May 2014

"Energy Value Chain" three day course, Phillips66, June and July 2013, Bartlesville

"Energy Value Chain" one day course, Phillips66, April, July, October and November 2013, Bartlesville and Houston

"Enterprise Risk Management: Enterprise Risk Budgeting and Other Advanced Risk Assessment Techniques", PolRisk, Warsaw, November 2012

"Masterclass: Advanced & Expert Strategies in Oil & Gas Finance and Accounting", Saudi Aramco, May and September2012

"Masterclass: Advanced & Expert Strategies in Oil & Gas Finance and Accounting", Euromoney, London, September 2012

"Masterclass: Advanced & Expert Strategies in Oil & Gas Finance and Accounting", 360bsi, London, July 2011

“Finance and Capital Investment Analysis for Project Managers and Technical Professionals”, 360bsi, Kuala Lumpur and Bahrain, July 2010; Jakarta and Dubai, Sept/Oct. 2010; Kuala Lumpur, May 2011; Dubai, April 2012

“Energy Finance and Economic Analysis”, Samson Resources, Tulsa, June/July 2010

“Upstream Operations Finance Masterclass”, UNI Strategic, Kuala Lumpur, Malaysia, May 2010

“Energy Finance”, Summit Bank, Tulsa, Oklahoma, June 2009

“Advanced Oil and Gas Finance and Accounting Strategies”, Marcus Evans, Dubai, April 2008

“Oil and Gas Finance and Accounting Strategies”, Marcus Evans, Bahrain, March 2006; Jakarta, Indonesia, February 2007

“Oil and Gas Risk Management Strategies”, Marcus Evans, Kuala Lumpur, Malaysia, May 2006; Bahrain, March 2007

“Implementing Strategic Risk Management”, Eksport Kredit Fonden (EKF, credit agency of the Danish government), Copenhagen, Denmark, May 2004

“Strategic Risk Management”, Eksport Kredit Fonden (EFK), Copenhagen, Denmark, November 2003

“Energy Hedging and Risk Management”, Petroleum Development Institute, Houston, Texas, October 2003

“Open-Book Finance: A New Direction in Corporate Finance,” OSU/OU Management Development Program, 1998

NATIONAL AND INTERNATIONAL PRESS AND GOVERNMENTAL CITATIONS

Interview and quoted by *Wall Street Journal*, April 9, 2014, “Impact on Hedging: Executives are Concerned New Rules Could Make it Harder to Buy Swaps”.

Interview and quoted by *The Journal Record*, many interviews, 2012, 2013, and 2014.

Interviewed by Channel 2 KJRH-TV News Station, Tulsa, Oklahoma, April 2012.

Interviewed and quoted by Boston Consulting Group, 2009.

Interviewed and quoted in *Securities Industry News*, July 14, 2008 issue on the topic of enterprise risk management.

Research on fuel hedging in the airline industry quoted in the *Wall Street Journal*, May 28, 2008; *USA Today*, July 24, 2008 and September 22, 2008; and *NPR* (National Public Radio), July 24, 2008.

Research quoted in testimony to the Senate Banking Committee (United States Senate hearing on the growth and development of the derivatives market), October 18, 2005.

Interviewed and quoted about my fuel hedging research in the airline industry by *Houston Chronicle*, October 29, 2004 issue; *Chicago Tribune*, October 12, 2004 issue; and *Kansas City Star*, January 20, 2005 issue. Also, interviewed by the *Wall Street Journal*, May, 2005.

Interviewed and quoted about my natural gas research in the following publications (among others): *Natural Gas Intelligence* (several times in 2004), *Natural Gas Week,* 2004, and *The Desk*, November 26, 2004 issue.

Research on enterprise risk management was quoted in *Compliance Week* on January 25, 2005. See: http://www.complianceweek.com/ for information about this publication.

EDITORIAL BOARDS, EDITORSHIPS, AND EDITORIAL SERVICE

Editor:

Editor, *Journal of Commodity Markets* (2015-present)

Co-Editor, *Journal of Applied Finance* (July 2007-2013), Co-edited with Ramesh Rao and Charles Smithson through 2011 and Ramesh Rao and Niso Abuaf.

Guest Editor, Special Issue on Corporate Governance for *Financial Review*, November 2009 (Volume 44, No. 4).

Executive Editor, *FMA Online* (2001-2010). Co-editors were John Finnerty, Mark Flannery, and Sheridan Titman.

Editorial Service:

Associate Editor, *Finance Research Letters* (2014-present)
Associate Editor, *Journal of Banking and Finance* (2013-present)
Associate Editor, *Journal of Applied Finance* (2013-present)
Associate Editor, *The British Accounting Review* (2013-present)
Associate Editor, *International Review of Financial Analysis* (2012-present)
Editorial Advisory Board, *Journal of Risk Finance* (2014-present)
Associate Editor, *American Journal of Business* (2011-present)
Associate Editor, *Research in International Business and Finance* (2010-2013)
Editorial Board, *The Journal of Enterprise Risk Management* (2013-present)
Editorial Board, *European Research Studies Journal*, (2008-present), website: www.ersj.eu
Editorial Advisory Board, *Journal of Finance Case Research* (2002-present)
Associate Editor, *Journal of Financial Education* (2000-2014)
Associate Editor, *Advances in Financial Education* (2003-2014)
Finance Editor, *Journal of Applied Business Research* (2000-2001)
Associate Editor, *Financial Practice and Education.* (1999-2000)

Referee:

Journals: *Advances in Futures and Options Research, British Accounting Review, Energy Economics, Financial Management, Financial Review, Journal of Air Transport Management, Journal of Applied Finance, Journal of Banking and Finance, Journal of Business Ethic, Journal of Corporate Finance, Journal of Derivatives Accounting, Journal of Finance, Journal of Financial and Quantitative Analysis, Journal of Financial Education, Journal of Financial Research, Journal of Futures Markets, Journal of International Business Studies, Journal of International Money and Finance, International Review of Economics and Finance, International Review of Financial Analysis, Management Science, Review of Financial Economics, Review of Futures Markets, Strategic Management Journal*

Book Reviews for Publishers: *Oxford University Press, Palgrave Macmillan, Routledge, Springer, John Wiley & Sons*

Government Reviews:

External Reviewer for Grant Proposals, Research Grants Council of Hong Kong, 2012, 2013, and 2015.

Independent Reviewer of grant proposals in Advanced Energy for the U.S. Department of Energy, 2010

POSITIONS IN PROFESSIONAL ORGANIZATIONS

Organizing Committee, 10th International Conference on Business and Finance (ICBF) 2014 Conference, IBS Hyderabad, January 8-10, 2014.
Program Committee, Applied Finance Conference, New York, May 2014
Co-Chair, Applied Finance Conference, New York (May 2011, May 2012, May 2013, upcoming for May 2015)
Strategic Risk Council Executive Advisory Committee, Conference Board of Canada (2009+), http://www.conferenceboard.ca/networks/src/default.aspx
Scientific Committee for Symposium on Corporate Governance, Center for Strategic Financial Management, Edwards School of Business, University of Saskatchewan (Canada), 2010.
Program Committee, FMA Asian Annual Conference, 2014
EFA, President, (2008-2009), Chair of Trustees (2009-2010), Trustee (2010-present)
Track Chair for Financial Education, FMA (2009)
Co-Track Chair for Risk Management, MFA (2009)
Vice-President Planning, EFA (2008)
Vice-President Program, EFA (2007)
Member, Board of Directors, FMA (2001-present)
Member, Board of Directors, EFA (2001-present)
Member, Arkansas Academy of Chemical Engineers (2006-present)
Derivatives Track Chair, EFA (2002)
Member, FMA Education Advisory Committee (2003-present)
Member, "E Brokerage" Committee, National Association of Securities Dealers (NASD) (2000)
Member, FMA Long-Range Planning Committee (2000-2001)
Manager, FMA WebBoard, established at Oklahoma State University (1999-2002)
Member, FMA Web Site Committee (1999-2007)
Member, EFA Nominating Committee (1999-2000)
Program Committees: FMA (1998+), EFA (1997+), SWFA (2004), SFA (1994, 1997), Applied Finance Conference (2014)
Discussant: FMA (1996+), FMA Euro (2002-2012), EFA (1994, 1999-2013), SFA (1994, 1997), MFA (1995)

MEMBERSHIPS IN PROFESSIONAL ORGANIZATIONS

Academic: AFA, FMA, MFA, SFA, EFA, and SWFA

Professional:
Global Association of Risk Professionals (GARP)
International Association for Energy Economics (IAEE)
NGEAO (Natural Gas and Energy Association of Oklahoma)
PRMIA (Professional Risk Managers International Association)
Society of Petroleum Engineers
Strategic Risk Council of the Conference Board of Canada
United States Association of Energy Economics (USAEE)

INSTRUCTIONAL PROFILE

Ph.D. Level:

Financial Theory and Corporate Policy
Research Methods in Finance (co-taught)

Masters Level:

Energy Finance
Enterprise Risk Management, Trinity College Dublin, Spring 2009-2014, upcoming in Spring 2015
Case Studies in Corporate Finance
Advanced Financial Management
Theory and Practice of Financial Management (also taught by distance learning)
Financial Planning
International Finance (taught December 2001 for Justus-Liebig University Giessen, Germany)

Undergraduate Level:

Energy Finance
Risk Management
Corporate Valuation
An Introduction to Wall Street, Investment Banking, and New York City
Corporate Finance and Honors Corporate Finance
Case Studies in Corporate Finance
International Corporate Governance (Taught in "Summer in London Program" in 2007)

Instructional Innovation and Development:

Attended: 2014 Deloitte Oil & Gas Conference, November 18, 2014, Houston
Attended: Alternative Investments Conference, September 19, 2014, University of Texas-Austin
Attended and Developed: OSU Midstream Conference, December 2013, October 2014, and upcoming October 2015.
Attended: "Appraising Reserves and Production Potential of Oil & Gas Fields: Conventional and Unconventional", Pennwell, Fall 2014
Attended: "RIMS Risk Summit 2012", July 2012, Chicago, IL
Attended: "Foundations of Energy Finance", October 2011, Houston, TX
Attended: "Quality Matters", OSU ITLE, April 2011, Stillwater, OK
Attended "Basic Petroleum Technology Seminar", held in Dallas, TX, October 2008
Attended "Natural Gas 101" Seminar, held in Tulsa, OK, March 2008
Attended "2007 Crystal Ball Oil & Gas Forum" held in Houston, TX
Developed: 'Live Case' Method of Teaching, in which students investigate real problems/issues that a company is addressing. Gave special session presentation at the 2000 EFA.
Developed: Future Trading Simulation, used in teaching and with the student chapter of FMA at OSU.
Attended "A Seminar on Case Method Teaching: The Art & Craft of Discussion Leadership", held at Harvard University, November, 1999

Dissertation Committees:

Yuecheng Jia, OSU Department of Finance, Dissertation Chair, dissertation in progress
Sara Lundqvist, Lund University, Sweden, Final Defense October 2014, "Abandoning Silos for Integration: Implementing Enterprise Risk Management and Risk Governance"
Corey Fox, OSU Department of Management, Final Defense July 2014, "Organizational Slack and Managerial Attention to Risk: Impact on an Organization's Experience with Harmful Surprises"
Jun Wang, Concordia University Department of Finance, "Corporate Governance, Credit Risk and Bondholder Wealth" (External Examiner)

Anne Elizabeth Lundquist, Western Michigan University Department of Education Leadership, Research and Technology, “Enterprise Risk Management”, proposal defended May 2014, in progress
Jordan Zimbelman, OSU Department of Finance, Proposal defended 2012, in progress
Subbu Iyer, OSU Department of Finance, Final Defense July 2012, “Two Essays on the Flexibility of Share Repurchases”
Allissa Lee, OSU Department of Finance, Final Defense May 2012, “Returns of Financial Mergers: Evidence from Serial and Nonserial Acquirers”
Kris Kemper, OSU Department of Finance, Final Defense Spring 2011, “Do Credit Ratings Really Affect Capital Structure?”
Phillip Humphrey, OSU Department of Finance, Dissertation Chair, Final Defense December 2010, “Determinants of Top Management Compensation: The Case of NCAA Football Head Coaches”
Surya Chelikani, OSU Department of Finance, Proposal defended Fall 2008, “The Effects of Regulatory Changes on Market Integration: A Cointegration Analysis Information Shares”
Emily Breit, OSU Department of Finance, Final Defense in 2008, “Implications of Subchapter S Tax Status for Commercial Banks”
Stephen Treavor, OSU Department of Finance, Final Defense in 2008, “Operational and Financial Hedges in Airlines Industry”
Frank D’Souza, OSU Department of Finance, Final Defense in 2008, “Equity Market Timing in Underlevered Firms, the WACC and Shareholder Benefit”
Haiyan Zhao, OSU Department of Industrial Engineering and Management, Final Defense in 2007, “Application of Uncertainty Analysis in Energy Savings Performance Contracts”
Jeff Whitworth, OSU Department of Finance, Final Defense in 2004, “Taxation and Ex-Dividend Stock Price Behavior Over Time”
Scott Wier, OSU Department of Economics, Final Defense in 2003, “Some New Comparative Statics Results Using Primal-Dual Analysis”

Honors Thesis or Other Advisor Activities:

Chris Holland, 2015, “Energy and Its Role in the US” (not final title)
David Skelton, 2013, “An Investigation into the Dynamics of Crude Oil Benchmark 2013”, MSc in Finance Thesis Topic, Trinity College Dublin
Zachary Keen, 2012, “The Revlon Standard: A Bad Corporate Governance Standard. Kinder Morgan’s Acquisition of El Paso Energy”
Chris Lillja, 2010, “Relative Valuation in the Oil and Gas Industry: Theory and Practice”
Jordan Fields, 2004, “Sarbanes-Oxley”
James Foster, 2003, “A Merger of Equals: The ConocoPhillips Merger”
Yekaterina Shutts, 2001, “Strategic Planning for a Nursing Home Facility: A Five-Step Model”
Michael Pondrom, 2001, “Online Trading: The Greatest Thing Since Sliced Bread, Or Is the Apocalypse Upon Us?”
Lori Parkinson, 2000, “The HMO Industry and Outlook”
Melinda Blundell, 1999, “Shareholder Activism”
Stephanie Pike, 1998, “Are Boards Leading Companies to Success?”

UNIVERSITY SERVICE CONTRIBUTIONS

Faculty Advisory Board, Career Readiness Initiative, Eastin Center for Leadership, Spears School of Business, Department of Management
OSU Midstream and Marketing Energy Conference, December 4-6, 2013; October 1-3, 2014
OSU Energy Conference Committee (2010, 2011, 2012, 2013, 2014)
Spears School of Business Dean Search Committee (2009)
Presidential Search Committee (2007)

Assessment and Continuous Improvement Committee (2007-present)
Provost's Teaching Research Grant Committee (2007-present)
FMA Faculty Advisor, OSU Student Chapter (2003-2007)
United Way Coordinator for the College of Business Administration at OSU (2001-2002)
United Way Department Representative (2002-present)
MBA Program Graduate Studies Committee (1998-2006)
FIN 5013/FIN 5053 and FIN 3113 Course Review Committees
Ex-Officio Member of the Committee for the proposed Masters of Science in Quantitative Financial Economics
Numerous other university teaching award and service committees