

FEA

Financial Education Association

27th Annual Conference

**The Historic Menger Hotel
San Antonio**

October 1 – 3, 2026

V 1.00

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Journal of Instructional Techniques in Finance

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Preliminary Schedule Notes

Meeting rooms will have high-speed WiFi access for registered attendees. The WiFi server is “University of Houston” and the password is will be given out at the registration desk.

This program (latest version) is posted in PDF at <https://www.jfedweb.org/>

Screens, projectors, laser pointers and laptops (with Windows 10 or 11) will be provided. One member of each session should serve as the session chair or timekeeper. **Each presenter should bring their presentation *on a standard USB drive*. We do not have the ability to preload presentations on session laptops. Also, The Menger Hotel does not have the ability to reproduce your session materials, so please bring some copies with you.**

On the MiniMap and Schedule, sessions are listed by conference session and room. For example, Session 1.2 is the first Thursday morning slot, 8 AM, in Room 2 on the left side of the minimap (in this case, Renaissance). Session 2.3 would be in Ballroom C at 10 AM, etc. A full program will be available shortly before the conference.

Financial Education Association (FEA) Annual Conference

The Historic Menger Hotel, San Antonio, Texas

October 1-3, 2026

Meeting rooms will have high-speed WiFi access for registered attendees. Screens, projectors and laptops (with Windows 10 or 11) will be provided. One member of each session may be asked to serve as session chair. Each presenter should bring printed copies of their paper along with materials for the presentation on a standard USB disk.

Thursday 10/1

Continental Breakfast items: 7:45 AM

Location: TBA

Session 1: 8 – 9:30

Break

Session 2: 10 – 11:30

Lunch: Cold cuts, soda, water

Location: TBA

Session 3: 12:15 – 1:45

Break

Session 4: 2 – 3:30

Session 5: 3:30 - 5

Reception: 5 - 7 PM

Location: TBA

Friday 10/2

Continental Breakfast items: 7:45 AM

Location: TBA

Session 6: 8 – 9:30

Break

Session 7: 10 – 11:30

Lunch: Deli Luncheon w/Keynote

Location: TBA

Session 8: 1 – 2:30 PM

Break

Session 9: 3 – 4:30 PM

Reception: 5 - 7 PM

Location: TBA

Saturday 10/3

Continental Breakfast items: 8 AM

Location: TBA

(this is subject to change)

**Financial Education Association 2026 Annual Conference
October 1-October 3, 2026**

*******All times are in Central Time (EST minus 1)*******

Thursday, October 1

Breakfast @ 7:45

Location / Time	1. Minuet	2. Renaissance	3. Ballroom C	4. Cavalier
Session 1 8 – 9:30	Panel: Technical Agility & Excel		Sponsor Session CFA Institute	Student Preparation I
Session 2 10 – 11:30	Panel: Developmental Needs of Students	Financial Literacy I	Panel: Student-Managed Investment Funds	Artificial Intelligence I
Lunch 11:30 – 12:15	Sandwich Tray Patio Room			
Session 3 12:15 – 1:45	Roundtable: Discussing Research, Brainstorming & Networking	Sponsor Session Blended Teaching	Teaching Innovations I	Artificial Intelligence II
Session 4 2 – 3:30	Teaching Innovations II	Cases & Case Teaching I	Sponsor Session StockTrak	Teaching Methods I
Session 5 3:30 – 5		Sponsor Session Blended Teaching	Sponsor Session ExPrep	

**Reception 5 – 7 in Patio Room, with cash bar
First bar drink is free! Provided by StockTrak
(Our thanks to Mark Brookshire)**

Friday, October 2nd

Breakfast at 7:45

Location / Time	1. Minuet	2. Renaissance	3. Ballroom C	4. Cavalier
Track 6 8 – 9:30	Panel: Academic Integrity (and AI)		Teaching Innovations III	Technical Agility I
Track 7 10 – 11:30	Panel: Artificial Intelligence	Financial Literacy II	Student-Managed Investment Funds	
Lunch 11:30 – 1	Our Usual Buffet Minuet Room Keynote: David Brown and Eric Kelly, Microsoft Excel Collegiate Challenge			
Track 8 1 – 2:30	Artificial Intelligence III		Sponsor Session Microsoft Excel Collegiate Challenge	Technical Agility II
Track 9 3 – 4:30	Student Preparedness II	Artificial Intelligence IV	Other Topics	Teaching Methods II

**Reception 5 – 7 in Patio Room, with cash bar
(No free drink sponsor yet)**

*******All times are in Central Time (EST minus 1)*******

Saturday, October 3rd

Breakfast at 8 AM in Lobby Area (Subject to change)

Coffee and Pastries

Thursday October 1st

Session 1, Room 1

Panel: Technical Agility in the Classroom

Timothy B. Michael, michael@uhcl.edu, University of Houston-Clear Lake

Howard Keen, Temple University

Mary Funck, Sam Houston State University

Melissa Williams, University of Houston-Clear Lake

Panel Topic: Excel and Technical Agility in the Age of Generative Artificial Intelligence

Panel Topic: Using Excel with SEC Data in a Financial Statements Analysis Course

Timothy B. Michael & Melissa Williams

Panel Topic: How AI impacts VBA coding

Mary Funck, mcf012@shsu.edu

Session 1, Room 3

Sponsor Session: CFA Institute - Introduction and Innovation

Chartered Financial Analyst Institute Information Session

Rob Langrick, rob.langrick@cfainstitute.org, CFA Institute

Session 1, Room 4

Student Preparedness I

Intellectual Capital as a Catalyst for Augmented Financial Performance in Technological Acquisitions

Irina Khindanova, Irina.Khindanova@du.edu, University of Denver

Cynthia Arthur, University of Denver

CMA: A Certification for Corporate Finance Professionals

Russ Porter, porterr2@sacredheart.edu, Sacred Heart University

Session 2, Room 1

Panel: Developmental Concerns, Student Preparation & Outcomes

Timothy B. Michael, michael@uhcl.edu, University of Houston-Clear Lake
Mary Funck, Sam Houston State University
Howard Keen, Temple University
Sara W. Michael, Texas Tech University College of Engineering
Melissa Williams, University of Houston Clear Lake

Panel Topic: Discussing the move away from digital resources.

Mary Funck, mcf012@shsu.edu, Sam Houston State University

Panel Topic: Students Working Smarter, Not Harder: Rethinking how we study.

Tim Michael, Sara Michael & Melissa Williams

Panel Topic: Yet Another Attempt at Engaging Students in a Large Section

Howard Keen, howard.keen@temple.edu, Temple University

Session 2, Room 2

Financial Literacy I

Bridging the Gap between Financial Literacy and Macroeconomics

Wayne Durr, wdurr@gardner-webb.edu, Gardner Webb University

Personal Financial Literacy Education for Undergraduates: A Ten-Module Curriculum Framework and Pedagogical Guide

Elven Riley, elven.riley@shu.edu, Seton Hall University

Rituals for Wealth in the University Classroom: A Whole-Person Framework for Financial Education

Colleen Asaad, casaad@bw.edu, Baldwin Wallace University

Session 2, Room 3

Panel: Student-Managed Investment Funds

Student Managed Funds: Current Issues and Practice

Lawrence Belcher, belcherl@uindy.edu, University of Indianapolis
Rob Langrick, Chartered Financial Analyst Institute

Session 2, Room 4

Artificial Intelligence I

Beyond Prompting

Jonathan Daigle, jdaigle@monmouth.edu, Monmouth University

Rebuilding the Learning Signal in AI-Mediated Finance Education

Kyle Wells, kyle.wells@utahtech.edu, Utah Tech University

Helen Saar, Utah Tech University

Does AI Usage Undermine Discussion Boards in Online Classes?

Marcus Allen, timallen@fgcu.edu, Florida Gulf Coast University

Session 3, Room 1

Roundtable: Research Ideas - Brainstorming and Networking

Randy Beavers, rebeavers@una.edu, University of North Alabama

Session 3, Room 2

Sponsor Session: Blended Teaching

Sam Butcher, sam@blended-teaching.com, Blended Teaching

Dan Pratte, Blended Teaching

Session 3, Room 3

Teaching Innovations I

Authentic Open-System Simulation and Behavioural Change in Active Learning: Evidence from a Trading Exercise

Binh Do, binh.do@monash.edu, Monash University

Michael Ciaravolo, Monash University

Recommendations to Improve a University's Retirement Incentive Plan: A Practical Application

Ausher Kofsky, ausher.kofsky@wne.edu, Western New England University

Recommendations to Improve a University's 403(b) Deferred Compensation Plan: A Practical Application

Ausher Kofsky, ausher.kofsky@wne.edu, Western New England University

Session 3, Room 4

Artificial Intelligence II

Integrating Generative AI into Quantitative Finance Education

Michael Gorman, gormanm6@sacredheart.edu, Sacred Heart University

Marina Giammattei, Sacred Heart University

Why AI Programs Fail in Higher Education: Operating Discipline Lessons from the 2024-2026 Deployment Wave

Chris Wasden, chris.wasden@ensign.edu, Ensign College

Designing AI-Augmented Finance Courses: A Hands-On Workshop on the Ten-Principle Diagnostic Framework

Chris Wasden, chris.wasden@ensign.edu, Ensign College

Session 4, Room 1

Teaching Innovations II

Integrating the Securities Industry Essentials Examination into Undergraduate Finance Education: Design, Implementation, and Lessons from a One-Credit Pilot Course

Mahsa Khoshnoud, mkhoshnoud@stetson.edu, Stetson University

Meeting CFA Exam Needs with a Revised Course in Financial Statement Analysis

Kurt Jesswein, jesswein@shsu.edu, Sam Houston State University

Multi-method analysis of on-line peer review & self-assessment

Sean Pinder, spinder@unimelb.edu.au, University of Melbourne

Assaf Dekel, University of Melbourne

Miriam Edwards, University of Melbourne

Session 4, Room 2

Case Teaching I

Case: The Fall of Northvolt

Elena Skouratova, Elena.Skouratova@concordia.edu, Concordia University

Sophie's Choice of a Retirement Portfolio Distribution Plan

Eugene Bland, eugene.bland@tamucc.edu, Texas A&M University - Corpus Christi

A Teaching Case on Using Professional Capital Market Expectations in the Portfolio Planning Process

Eric Fricke, eric.fricke@csueastbay.edu, California State University, East Bay

Tesla and SolarCity: Vision or Bailout?

Megan Ramsey, meganramsey@missouristate.edu, Missouri State University

Tabitha Henderson, Missouri State University

Seth Hoelscher, Missouri State University

Session 4, Room 3**Sponsor: StockTrak - Virtual Stock Market Simulator**

Mark Brookshire, mark@stocktrak.com, StockTrak

Session 4, Room 4**Teaching Methods I****Will students do anything for extra credit?**

Randy Beavers, rebeavers@una.edu, University of North Alabama

Teaching Benford's Law with Excel: A Classroom-Ready Framework for Finance Education

Mike Hollander, mgh035@shsu.edu, Sam Houston State University

Real Estate Rent vs. Buy: A Custom Semester-length Capital Budgeting Project

Jim Turner, JamesTurner@weber.edu, Weber State University

Session 5, Room 3**Sponsor Session: ExPrep.com - Excel Grading Platform**

ExPrep Representative, ExPrep

Session 5, Room 2

Sponsor Session: Blended Teaching

Sam Butcher, sam@blended-teaching.com, Blended Teaching
Dan Pratte, Blended Teaching

FRIDAY 10/2

Session 6, Room 1

Panel: Cheating, Artificial Intelligence and the future of Academics

Timothy B. Michael, michael@uhcl.edu, University of Houston-Clear Lake
Howard Keen, Temple University
Mary Funk, Sam Houston State University
Melissa Williams, University of Houston-Clear Lake

Panel Topic: Managing to Stay One Step Behind Student Cheating

Howard Keen, howard.keen@temple.edu, Temple University

Panel Topic: New Tools in Academic Integrity and the Reputations of University Programs

Mary Funk, mcf012@shsu.edu

Panel Topic: A Best Practices Document for the Age of Artificial Intelligence

Timothy B. Michael & Melissa Williams, UH – Clear Lake

Session 6, Room 3

Teaching Innovations III

A Profession Under Pressure: Evidence from a National Survey of Australian Finance Academics

Sean Pinder, spinder@unimelb.edu.au, University of Melbourne

Opening the Black Box of Operating Expenses: The Implications of FASB ASU 2024-03 for Financial Analysis and Forecasting

Bridget Lyons, lyonsb@sacredheart.edu, Sacred Heart University
Barbara Tarasovic

Exploring The Role of Personal Values on Undergraduate Finance Major Selection: A Qualitative Approach

Pablo Calafiore, pcalafio@tamusa.edu, Texas A&M University - San Antonio
Roberto Saldivar, Texas A&M University - San Antonio
Halimin Herjanto, Marymount University
Soumya Sivakumar, Marymount University

Session 6, Room 4

Technical Agility I

Happy Homes at the Crossroads: Balancing Financial Sustainability with Strategic Decisions

Sanjay Jain, sjain@salemstate.edu, Salem State University
Anurag Jain, Salem State University
Hongtao Guo, Salem State University

Gamification of a Series of Two-Stage PivotTable Assignments

Jonathan Stewart, stewartjo@acu.edu, Abilene Christian University

Financial Statement Modeling with a Focus on Short-Term Financial Management: Lincoln Electric Company

Bree Dority, doritybl@unk.edu, University of Nebraska at Kearney

Session 7, Room 1

Panel: Artificial Intelligence in the Business Classroom

Panel: Teaching with Artificial Intelligence (topics to follow)

Timothy B. Michael, michael@uhcl.edu, University of Houston-Clear Lake
Mary Funck, Sam Houston State University
Valeria Martinez, Fairfield University
Howard Keen, Temple University
Melissa Williams, University of Houston-Clear Lake

Session 7, Room 2

Financial Literacy II

Digital-Internet Divide and Financial Literacy in Minnesota

Ishuan Li Simonson, ishuan.li@mnsu.edu, Minnesota State University Mankato
Kevin Musembi, Minnesota State University Mankato

Rural-Urban Disparities in Financial Literacy and Capability in Minnesota

Ishuan Li Simonson, ishuan.li@mnsu.edu, Minnesota State University Mankato

Jenna Sikel, Minnesota State University Mankato

Equivalence between Gordon constant growth model and residual income model

Chee Ng, ngc@uwgb.edu, Univ of Wisconsin - Green Bay

Session 7, Room 3

Student-Managed Funds I

Alternative Asset Classes in Student Managed Investment Funds: A Survey Analysis

Lawrence Belcher, belcherl@uindy.edu, University of Indianapolis

Experiential learning: academic vs real-life investment performance

Danilo Lopomo Beteto, danilo.lopomobeteto@sydney.edu.au, University of Sydney

Developing Analytical Skills and Shariah Literacy Competence using Stock Investment Simulation

Sofi Mohd Fikri, mohdfikri@uum.edu.my, Universiti Utara Malaysia

Amirul Haqem Abd. Ghani, Universiti Utara Malaysia

Sirajo Aliyu, Universiti Utara Malaysia

Session 8, Room 1

Artificial Intelligence III

Using AI Tools to Generate Trading Comparables: A Case Study

Bridget Lyons, lyonsb@sacredheart.edu, Sacred Heart University

Prompting Sustainable Finance: How Assignment Design Shapes Student Interactions with Generative AI

Mary Anne Majadillas, mmajadillas@csumb.edu, Cal State University Monterey Bay

Leslie Boni, Cal State University Monterey Bay

Human First, AI Second: A comparative coding exercise for Python in finance

Xinxin Li, xli4@ithaca.edu, Ithaca College

Session 8, Room 3

Sponsor Session: Microsoft Excel Collegiate Challenge

Introduction to Microsoft Excel Collegiate Challenge (MECC)

David Brown, debrown@arizona.edu, University of Arizona

Eric Kelly, University of Tennessee

Session 8, Room 4

Technical Agility II

Fintech: You Can't Teach What You Can't Describe

Elven Riley, elven.riley@shu.edu, Seton Hall University

From Doing to Being: Developing Professional Identity in a Student-Managed Investment Fund

Brian Haughey, Brian.Haughey@Marist.edu, Marist University

Creativity and Graph Data in Finance

A. Can Inci, ainci@bryant.edu, Bryant University

Session 9, Room 1

Student Preparedness II

Speaking Truth To Students

Jonathan Godbey, jgodbey@gsu.edu, Georgia State University

The Hidden Costs of Sending Money to Fragile States: A Case Study of Positive Ripples: Remittances to Haiti

Jonathan Godbey, jgodbey@gsu.edu, Georgia State University

Question Formulation Technique for Learning in Undergraduate Finance

James Marner, james.marner@shu.edu, Seton Hall University

Session 9, Room 2

Artificial Intelligence IV

Graduate Student Perceptions of Artificial Intelligence in Finance Education: A Survey-Based Inquiry into Awareness, Trust, Ethics, and Career Readiness

Nichole Castater, ncastater@fau.edu, Florida Atlantic University

Navigating technological change: We've been here before

Russell Porter, porterr2@sacredheart.edu, Sacred Heart University

AI and Teaching Business Communication: A Business Writing Assignment

Tamara Gillis, GILLISTL@etown.edu, Elizabethtown College

Session 9, Room 3

Other Topics

More Chiefs, Fewer Professors? The Changing Composition of University Payrolls.

Mary Funck, mcf012@shsu.edu, Sam Houston State University

Two Growth Rates, Two Probabilities, Two Options: New Perspectives on Black-Scholes

Brian Haughey, Brian.Haughey@Marist.edu, Marist University

The Ascent, Descent, and Regulation of SPACs: An Application of the Gartner Hype Cycle

Mahendra Gujarathi, mgujarathi@bentley.edu, Bentley University

Session 9, Room 4

Teaching Methods II

**Beyond the Numbers: Integrating Textual Disclosure Analysis
into Financial Statement Analysis**

Hyuna Park, hyuna.park38@brooklyn.cuny.edu, City University of New York - Brooklyn College

Hedge Your Grade

David Brown, dcbrown@arizona.edu, University of Arizona

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Financial Times, 2020

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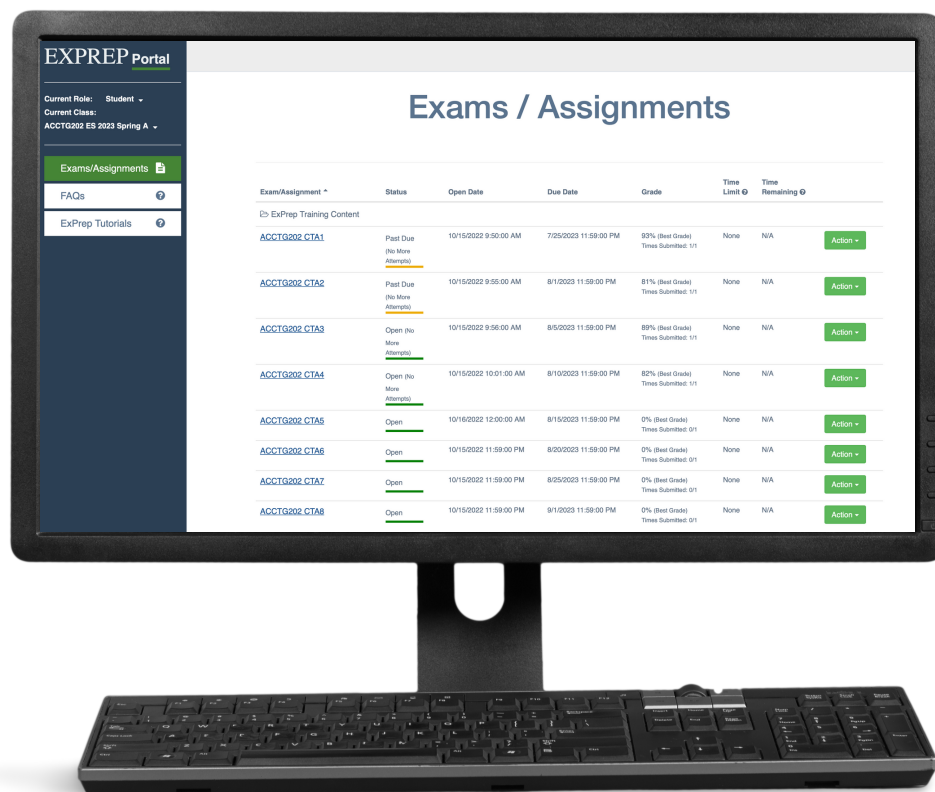


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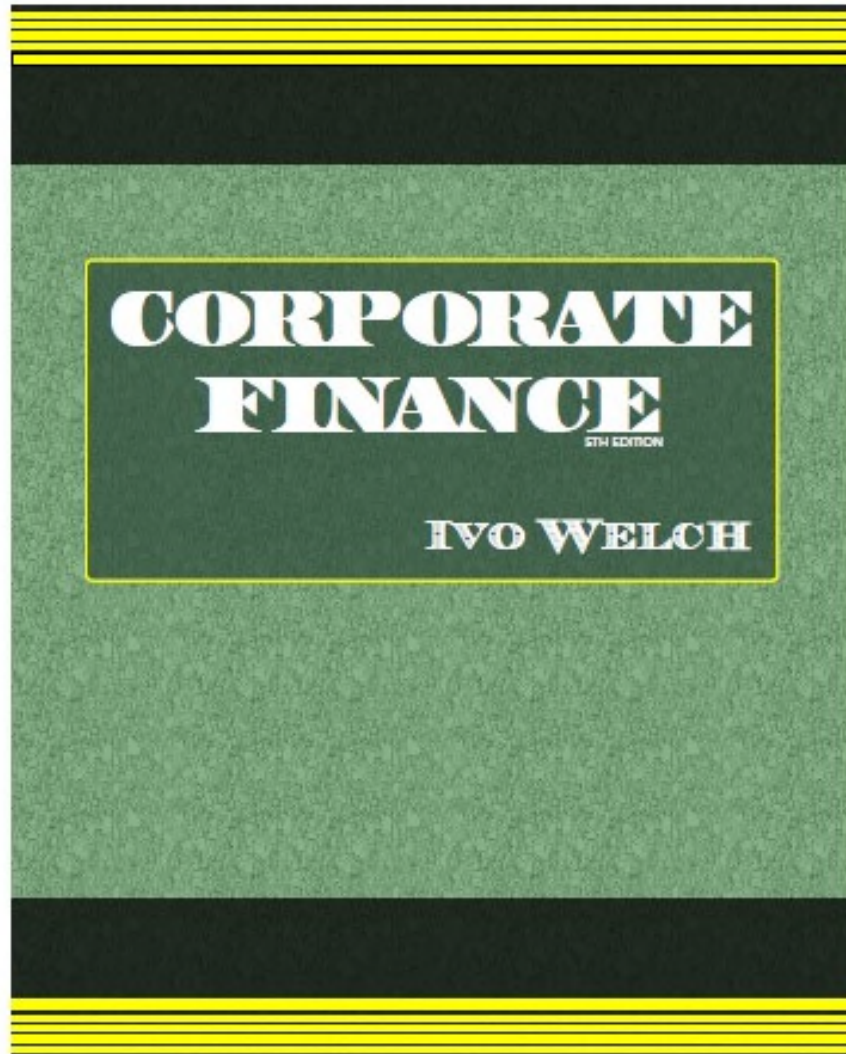


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Pedagogy in Financial Education**

**Best Paper
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**FINANCIAL EDUCATION ASSOCIATION
ANNUAL MEETING 2026
DIRECTORY OF PARTICIPANTS**

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				6.1
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