

Walter Anderson (Andy) Puckett

Department of Finance
University of Tennessee
Haslam College of Business
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ACADEMIC APPOINTMENTS

- 2009 – Present **University of Tennessee, Knoxville, TN**
Professor of Finance – (2017-present)
Paul and Beverly Castagna Professorship in Investments – (2015-present)
- Associate Professor of Finance – (2012-2017)
Kinney Family Faculty Research Fellow – (2015-2017)
PhD Program Coordinator – (2014 – 2020)
- Assistant Professor of Finance – (2009-2012)
College of Business Massingale Scholar – (2012-2015)
Home Federal Bank of Tennessee Banking and Finance Scholar – (2013-2015)
- 2017 **University of Canterbury, Christchurch, New Zealand**
Erskine Fellow / Visiting Professor
January – July 2017
- 2005 – 2009 **University of Missouri, Columbia, MO**
Assistant Professor of Finance
- 2004 – 2005 **University of Georgia, Athens, GA**
Temporary Assistant Professor of Finance, Terry College of Business

EDUCATION

- Ph.D. **University of Georgia** Finance August 2004
Dissertation: *Who Listens to Analysts: Two Essays on Analyst Recommendations*
Dissertation Chair: Marc Lipson
- B.S. **Auburn University** Finance (*Magna Cum Laude*) May 1996

RESEARCH INTERESTS

Investments, Institutional Trading, Market Microstructure, Executive Compensation, and Sell-Side Analysts.

PUBLICATIONS

- Cicero, David, Andy Puckett, Albert Want, and Shen Zhang, 2023, TAXI! Do Mutual Funds Pursue and Exploit Information on Local Companies, *Journal of Financial and Quantitative Analysis*, forthcoming.
- Chen, Haosi (Chelsea) and Andy Puckett, 2023, Do Hedge Funds Value Sell-Side Analysts Differently?, *Journal of Banking and Finance*, forthcoming.

- Anand, Amber, Jian Hua, and Andy Puckett, 2023, The Information in Hedge Fund Option Holdings, *Management Science*, forthcoming.
- Biggerstaff, Lee, David Cicero, and Andy Puckett, 2017, FORE! An analysis of CEO shirking, *Management Science* 63(7), 2302-2322.
- Biggerstaff, Lee, David Cicero, and Andy Puckett, 2015, Suspect CEOs, Unethical Culture, and Corporate Misbehavior, *Journal of Financial Economics* 117, 98-121.
- Lynch, Andrew, Andy Puckett, and Sterling Yan, 2014, Institutions and the Turn-of-the-Year Effect: Evidence from Institutional Trading, *Journal of Banking and Finance* 49, 56-68.
- Anand, Amber, Paul Irvine, Andy Puckett, and Kumar Venkataraman, 2013, Institutional Trading and Stock Resiliency: Evidence from the 2007-2009 Financial Crisis, *Journal of Financial Economics* 108(3), 773-797.
- Anand, Amber, Paul Irvine, Andy Puckett, and Kumar Venkataraman, 2012, Performance of Institutional Trading Desks: An Analysis of Persistence in Trading Costs, *Review of Financial Studies* 25(2), 557-598.
- Puckett, Andy and Sterling Yan, 2011, The Interim Trading Skill of Institutional Investors, *Journal of Finance* 66, 601-633.
- Moser, Bill, Kaye Newberry, and Andy Puckett, 2011, Bank Debt Covenants and Firms' Responses to FAS 150 Liability Recognition: Evidence from Trust Preferred Stock, *Review of Accounting Studies* 16, 355-376.
- Irvine, Paul, Michael Goldstein, and Andy Puckett, 2011, Purchasing IPOs with Commissions, *Journal of Financial and Quantitative Analysis* 46 (5), 1193-1225. (**Lead Article**)
- Brockman, Paul, Xiumin Martin, and Andy Puckett, 2010, Voluntary Disclosures and the Exercise of CEO Stock Options, *Journal of Corporate Finance* 16, 120-136.
- Moser, Bill and Andy Puckett, 2009, Dividend Tax Clienteles: Evidence from Tax Law Changes, *Journal of the American Taxation Association* 31, 1-22. (**Lead Article**)
- Irvine, Paul, Marc Lipson, and Andy Puckett, 2007, Tipping, *Review of Financial Studies* 20, 741-768.

PRACTITIONER-ORIENTED PUBLICATIONS

Where unethical corporate culture comes from, VOX EU – CEPR, September 29, 2013.

Is Your Firm Underperforming? Your CEO Might Be Golfing Too Much, Harvard Business Review, November 30, 2016.

CURRENT WORKING PAPERS (Active)

“Dark Trading and Market Quality: A Natural Experiment” (with Eric Kelley and Ryan Farley)

- Best Paper Award – Mid-Atlantic Research Conference (MARC)
- Best Paper Award in Market Microstructure - FMA

“Do Analysts Pay Attention to Academic Research” (with Chelsea Chen)

CURRENT WORKS IN PROGRESS

“Who Blinks in Volatile Markets?” (with Marc Lipson and Will Zhang)

“Market Timing Skills: A Clean Test” (with David Maslar and Andrew Lynch)

“Insider Trading and Gamestonk” (with Chelsea Chen)

PAPER PRESENTATIONS

TAXI! Do Mutual Funds Pursue and Exploit Information on Local Companies

2023: University of Louisville, Baruch College, University of Alabama

2022: University of Wisconsin-Milwaukee, Old Dominion University

2021: University of Nebraska, Iowa State University, Villanova University, Eastern Finance Association*, Western Finance Association*, China International Finance Conference*, Kent State*

2020: European Finance Association*, Financial Management Association*

Do Hedge Funds Value Sell-Side Analysts Differently

2020: Univ. of Tennessee, Financial Management Association*

Do Analysts Pay Attention to Academic Research

2019: Eastern Finance Association Conference*

Dark Trading and Market Quality: A Natural Experiment

2019: Eastern Finance Association*

2018: Universite of Paris-Dauphine, Financial Management Association*, Mid-Atlantic Research Conference*, University of Tennessee*

Option Skills

2021: Middle Tennessee State University

2019: Univ. of Missouri

2018: Cubist*, Northeastern University Finance Conference, Financial Management Association

2017: Singapore Management University, National University of Singapore, Hong Kong Science and Technology, Chinese University of Hong Kong

The performance of Institutional Investor trades across the supply chain

2017: University of Canterbury, University of Otago

2016: University of Washington, Clemson, Miami (Ohio), Magnolia Conference (Mississippi State U.), Texas Tech University, North Carolina State University, Financial Management Association Annual Meeting*

2015: National Taiwanese University, Hong Kong Polytechnic University

Information Production in the Market for Private Placements

2015: Financial Management Association Annual Meeting*, World Risk Insurance and Economics (Munich, Germany)*

FORE! An Analysis of CEO Shirking

2015: Frontiers in Finance Conference, National Chengchi University (Taiwan)

2014: University of Mississippi, Auburn University, Miami Behavioral Conference*

2013: Financial Management Association Annual Meeting (top 10 session)*, Villanova University*, University of Miami (Ohio)*, Suffolk University*, University of Alabama-Huntsville*, Wayne State University*, University of Nebraska*

Suspect CEOs, Unethical Culture, and Corporate Misbehavior

2013: University of South Florida, University of Alabama*, University of Lugano (Switzerland), FMA European Conference

2012: Financial Management Association Annual Meeting (semi-finalist for *Best Paper in Corporate Finance Award*)*, AAA annual meeting*, University of Delaware*, Mid-Atlantic Research Conference*, University of Georgia*

2011: NBER conference on "Causes and Consequences of Corporate Culture", University of Tennessee*

Institutional Trading and Stock Resiliency: Evidence from the 2007-2009 Financial Crisis

2011: Western Finance Association Annual Meeting*, Financial Intermediation Research Society*

2010: NBER Market Microstructure Conference*, Financial Management Association Annual Meeting (top session – *Best Paper in Market Microstructure Award*)*, AIM Institutional Investor Conference (Univ. of Texas-Austin)*, University of Alabama, University of Tennessee, 3rd Conference on Financial Market Quality (Université Paris-Dauphine & Nyse-Euronext)*, Mid-Atlantic Research Conference, Creates Symposium for Market Microstructure-Denmark*, Georgia State University, Southern Methodist University*, Securities and Exchange Commission*, Commodity Futures Trading Commission*

2009: University of Arizona, University of Texas-Dallas*, University of New South Wales*

Performance of Institutional Trading Desks: An Analysis of Persistence in Trading Costs

2012: Liquidnet 12th annual Traders Summit*

2011: SAC Capital, Chicago Quantitative Alliance, Bank of America Merrill Lynch*, Quorum 15 (Buy- and Sell-Side Institution Association)*

2010: Utah Winter Finance Conference*, American Finance Association Annual Meeting, Villanova*, Rutgers*

2009: Goldman Sachs Equities Strategies Group*, Babson College*, Georgia State University*, University of New South Wales*, Southern Methodist University*, University of Virginia*, University of North Carolina-Charlotte*

2008: 3rd Annual IIROC conference*, Indian School of Business*, Nanyang Technological University*, National University of Singapore*, Singapore Management University*, Securities and Exchange Commission*, Commodity Futures Trading Commission*, Financial Industry Regulatory Authority*

Do Institutional Investors Have Market Timing Skills? Evidence From ETFs

2012: Villanova University

2010: China International Conference on Finance*, Financial Management Association Annual Meeting*, University of Missouri*

2009: University of Tennessee

Institutions and the Turn-of-the-Year Effect: Evidence from Institutional Trading

2010: Financial Management Association Annual Meeting*

The Interim Trading Skill of Institutional Investors

2009: American Finance Association Annual Meeting, National University of Taiwan*

2008: University of Tennessee, University of Missouri

Short-term Institutional Herding and Its Impact on Stock Prices

2009: Singapore International Conference*

2007: University of Kansas, University of Missouri

Voluntary Disclosures and the Exercise of CEO Stock Options

2009: American Finance Association Annual Meeting

2008: HEC-Paris*, Lehigh University*, Lingnan University-Hong Kong*

2007: University of Missouri

Purchasing IPOs with Commissions

2007: American Finance Association Annual Meeting*, Financial Management Association Annual Meeting (top 10% session)*, Bentley College*, University of Virginia*, University of Missouri, University of Nebraska*, Syracuse University*

2006: Harvard Business School EVI conference, Clemson University*

Dividend Tax Clienteles: Evidence from Tax Law Changes

2007: Journal of American Taxation Association Conference*, Oklahoma State University Research Symposium*

2006: University of Missouri

Tipping

2005: American Finance Association Annual Meeting, Indiana University*, Michigan State University*, University of Virginia*, Dartmouth College*

2004: NBER Market Microstructure Conference*, Southern Finance Association Annual Meeting (*Best Paper in Financial Institutions* Award), University of Missouri, Drexel University, Florida State University, Financial Management Association Annual Meeting, University of Alabama-Birmingham, Midwest Finance Association Annual Meeting, Georgia State University

2003: Doctoral Consortium at the Financial Management Association Annual Meeting

Institutional Trading During Extreme Market Movements

2006: University of Missouri, Securities and Exchange Commission*, University of Mississippi*

2005: Financial Management Association Annual Meeting

2004: Mississippi State University, University of Georgia

Are Lead Analysts Really Optimistic?

2003: Financial Management Association Annual Meeting

2002: University of Georgia

(* indicates presentation by co-author)

HONORS AND AWARDS

John Wachowicz Outstanding Teacher Award, 2021

Semi-Finalist for Best Paper Award (for **Do Hedge Funds Value Sell-Side Analysts Differently**) FMA Annual Meeting, 2020

Semi-Finalist for Best Paper Award (for **Do Mutual Funds Exploit Information on Local Companies? Evidence from Fund-Firm Taxi Trips in NYC**) FMA Annual Meeting, 2020

Best Paper Award in Market Microstructure (for **Dark Trading and Market Quality: A Natural Experiment**) Financial Management Association Conference, 2018

Best Paper Award (for **Dark Trading and Market Quality: A Natural Experiment**) Mid-Atlantic Research Conference, 2018

Semi-Finalist for Best Paper Award (for **Option Skills**) FMA European Annual Meeting, 2018

Featured article for Quest Magazine, 2016

Finalist for William L. Vallett Outstanding Researcher Award, 2016

University of Tennessee Quest Scholar of the Week, 2015

Martin and Carol Robinson Excellence in Teaching, Research, and Service Award, 2014

University of Tennessee Quest Scholar of the Week, 2013

Semi-Finalist for Best Paper Award (for **Suspect CEOs, Unethical Culture, and Corporate Misbehavior**) FMA Annual Meeting, 2012

University of Tennessee Quest Scholar of the Week, 2011

William L. Vallett Outstanding Researcher Award, 2011

Best Paper Award (for **Market Crashes and Institutional Trading**) FMA Annual Meeting, 2010

Best Paper Award (for **Tipping**) Southern Finance Association Annual Meeting, 2004

Summer Graduate Research Award (with PhD student Lee Biggerstaff), 2011

Raymond and Mary O'Brien Excellence in Teaching Award, 2008

University of Missouri Research Board Grant, 2007-2008

Dissertation Completion Assistantship, 2003-2004

Outstanding Teaching Assistant Award, 2003

Dince Scholarship 2003-2004

AFA PhD travel award recipient, 2003

Terry Summer Research Award, 2002, 2003

Edward T. Comer Fellowship, 2000-2002
 Alvin B. Biscoe Fellowship, 2000-2001
 UGA University-Wide Assistantship, 2000-2002

TEACHING EXPERIENCE

University of Tennessee

Asset Pricing (Finance 652)	PhD	2010, 2012, 2014, 2016, 2018, 2020,2022
Debt and Derivatives (Finance 445)	Undergraduate	2013, 2014, 2015, 2016,2020
Investments (Finance 425)	Undergraduate	2009, 2010, 2012, 2013, 2016, 2018,2020,2021,2022, 2023
Fintech and Cryptocurrency (FINC 402)	Undergraduate	2022,2023
Professional MBA lectures	ProMBA	2012, 2013, 2014, 2015, 2016, 2017, 2018,2019,2020,2021

University of Canterbury

Asset Pricing	Masters	2017
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University of Missouri-Columbia

Investments (Finance 4020)	Undergraduate	2005, 2006, 2007, 2008
Investment Fund Mgmt. (Fin 7820)	MBA/Undergraduate	2007, 2008, 2009

University of Georgia

Financial Management (FINA 3000)	Undergraduate	2002, 2003
Research Methodologies (FINA 9130)	PhD	2003, 2004
Corporate Finance Theory (FINA 4200)	Undergraduate	2004, 2005
Computers in Finance (FINA 4920)	Undergraduate	2004, 2005

Executive Education - Universidad Santa María
 Guayaquil, Ecuador May, 2009

PROFESSIONAL EXPERIENCE

Financial Advisor Prudential Securities Birmingham, AL 1999-2000
 Responsible for managing investment portfolios for retail clients.

Investment Advisor PaineWebber Birmingham, AL 1996-1999
 Responsible for managing investment portfolios for retail clients. Received the CORE asset award in 1997 and 1998.

MEDIA MENTIONS

Aug. 18, 2021 – Motley Fool – 81% of Ultra-High-Net-Worth Individuals Use Alternative Investments
 Feb. 2, 2018 – UT News – “Bitcoin: Five Questions with Andy Puckett”
 Oct 12, 2017 – WATE.com (ABC) “Top apps for millennials to invest in stocks”

Sept. 15, 2017 – Wall Street Journal online “Is Playing Golf Good for Business?”
 Sept. 14, 2017 – Nashville Scene “Cities Are Divesting From Private Prisons, but Not Nashville”
 Aug. 17, 2017 – WalletHub “Ask the Experts: What Can We Learn From Hedge Funds”
 Mar 31, 2017 – Chicago Tribune “Fore! CEOs who golf too much are worse at their jobs”
 Feb. 16, 2017 – LinkedIn – “The Buyside is Taking the Bull by the Horns – In-sourcing Trade Execution”
 Nov. 30, 2016 – Harvard Business Review “Is your Firm Underperforming? Your CEO Might Be Golfing Too Much”
 Sept. 24, 2016 – Radio Show with Jim Brogan
 Sept. 22, 2016 – Improbable Research “An analysis of CEO shirking (at the golf course)”
 Aug. 8, 2016 – The Fiscal Times “The Secret Indicator of a Bad CEO: His Golf Game”
 Aug. 28, 2015 – Gaebler, “Unethical CEOs Hurt All of Us”
 May 18, 2015 – CNBC, “Poof! CEOs hurt companies by golfing too much”
 Apr. 13, 2015 – Bloomberg, “Study May Provide First Real Proof of How Tone at the Top Impacts Ethics”
 Dec. 7, 2014 – Psychology Today, “Board Role in managing uninvolved CEOs”
 Dec. 3, 2014 - BBC Radio World Service Business Daily, “Sport: playing a business game”
 Nov. 21, 2014 - Wall Street Journal, Morning Risk Report, “Golf and governance – Handicapping CEOs”
 Nov. 21, 2014 - The Globe and Mail, “Study says golf-obsessed CEOs bad for business”
 Nov. 19, 2014 - Golf Digest.com, “Study finds that work gets in the way of CEO’s golf games”
 Nov. 19, 2014 – Newsmax, “Study: Companies with heavy-golfing CEOs generally underperform”
 Nov. 18, 2014 - The Fiscal Times, “Investors are teed off about absent CEO golf addicts”
 Nov. 18, 2014 - Business Insider, “The truth comes out about CEOs who play too much golf”
 Sept. 13, 2014 – Phys.org, “CEOs who misbehave more likely part of unethical corporate culture”
 Aug. 13, 2013 – Mynyanville, “Study: Rotten Corporations Stink From the Head Down”
 Aug. 9, 2013 – Wall Street Journal online, “Suspect CEOs more likely to get caught during downturns”
 July/Aug. 2010 – MarketsMedia Magazine, “Traders, Brokers, and Money: The Past is Your Present and Future”
 April 30, 2010 - The Economist: Economist Intelligence Unit, “Parsing the Financial Crisis: First Evidence of a Lost Decade”

The following are feature articles that appeared on Harvard’s Corporate Governance Blog:

Mar. 24, 2015 – “Suspect CEOs, Unethical Culture, and Corporate Misbehavior”
 Nov. 18, 2014 – “Shirking CEOs”

CONSULTING ACTIVITIES

Department of Defense – Study on the feasibility of performance bonds in defense contracting - 2012
 Bush Brothers – family education initiative - 2010, 2011
 Executive Education - Guayaquil, Ecuador - 2009

SERVICE ACTIVITIES

External Service

Western Finance Association Meeting Program Committee (2021,2022,2023)
 Track Chair (Investments) for Southern Finance Assoc. Conf. (2021)
 Track Chair (Financial Markets and Microstructure) for Mid-Atlantic Research Conf. (2019)
 Track Chair (Markets and Institutions) for Eastern Finance Assoc. Conference (2019)
 Board of Trustees – Eastern Finance Association (2018-2021)
 Associate Editor – The Financial Review (2018-present)
 Track Co-Chair (Investments) for Southern Finance Assoc. Conference (2016)
 Research Review Committee for *Heathy Markets* <http://www.healthymarkets.org/> (2015- present)
 Review Panel for “Best Paper” award in Investments for the FMA meeting (2012, 2014)
 Associate Editor – Journal of Undergraduate Research in Finance (2010-present)
 Review Panel for “Best Paper” award in Investments for the EFA meeting (2012)
 Financial Management Association Meeting Program Committee (2007, 2009, 2011, 2012, 2013, 2014, 2015,2016,2018,2019,2020,2021,2022,2023)

European Finance Association Meeting Program Committee (2014,2015,2016,2018,2019,2020,2021,2022, 2023)
Kentucky Finance Conference Program Committee (2016, 2017, 2018,2019,2020)

External letter writer for tenure and promotion

- Utah State University, University of Texas – Arlington, Auburn University, Clemson University, Babson, North Carolina State University, Mississippi State University, Baylor University, Old Dominion University, Marquette University, Miami University

Internal Service

Chair of Search Committee – Tenure Track (2019-2020, 2021-2022, 2023-2024)
Masters Investment Learning Center Committee – Chair (2021-present)
PhD program committee – member (2020 – present)
Co-Organizer (with Eric Kelley) of Smokey Mountain Finance Conference (2016-present)
Board of Trustees UT System – ERS committee (2022-2023)
University Faculty Council (2022-2023)
Provost’s Tenured Faculty Advisory Council (2020-2023)
Undergraduate Council (2020-2023)
Undergraduate Appeals Committee (2022-2023)
Undergraduate Academic Policy Committee (2020-2022)
Faculty Research Council – HCB (2017-2022)
Promotion and Tenure Committee - HCB (2017-2020,2023)
PhD program Coordinator (2014-2020)
Search Committee – NTT (2019-2020, 2021-2022)
Chair of the Teaching Review Committee (2017-2020)
Chair of the Finance PhD program Committee (2014-2020)
Haslam College of Business PhD program Committee (2014-2020)
Faculty Search Committee NTT (2016)
Review Committee for Supply Chain Management and Marketing (2016)
Chair of the Dept. Strategic Mission Committee (2015-2016)
Dean’s Faculty Advisory Council (2012-2016)
Masters Investment Learning Center Committee (2009-2017)
University of Tennessee Faculty Senate (2013-2015)
Finance PhD program Committee (2009-2014)
Coordinator for Seminar Speaker series (2011-2013)
Peer Research Review Committee (2012)
Faculty Search Committee (2010,2013,2014)
Strategic Planning Committee (2010-2012)
Library Liason (2008, 2009)
Internationalization Committee (2008, 2009)
Scholarship Committee (2006-2008)
Research and Development Committee (2005, 2006)
Undergraduate Programs Committee (2006- 2008)
Chair of the Finance Dept. Curriculum Committee (2006- 2008)

REFeree ACTIVITIES

Review of Financial Studies
Journal of Finance
Journal of Financial and Quantitative Analysis
Management Science
Financial Management
Review of Finance
Review of Asset Pricing Studies
Journal of Financial Markets

Journal of Empirical Finance
 Journal of Corporate Finance
 Journal of Banking and Finance
 Journal of Financial Markets
 Journal of Financial Research
 Journal of Money, Credit, and Banking
 The Financial Review
 Financial Research Letters
 International Review of Financial Analysis
 The Quarterly Review of Economics and Finance
 Hong Kong Research Grants Council

PHD STUDENT ADVISING

<u>Student</u>	<u>Area</u>	<u>Role</u>	<u>First Placement</u>
Asa Lambert	Finance (2020)	Committee Co-Chair	Mercer University
Ryan Farley	Finance (2019)	Committee Chair	Univ. of Tennessee
Chelsea Chen	Finance (2018)	Committee Chair	Ohio University
Dallin Alldredge	Finance (2015)	Committee Chair	Washington State Univ.
Lee Biggerstaff	Finance (2014)	Committee Chair	Miami Univ. (Ohio)
Connor Kasten	Finance (2022)	Committee Member	East Carolina Univ.
Corbin Fox	Finance (2019)	Committee Member	James Madison Univ.
Peter Dixon	Finance (2018)	Committee Member	SEC
Brian Blank	Finance (2016)	Committee Member	Mississippi State (visiting)
Syed Kamal	Finance (2016)	Committee Member	Austin College
Brandy Hopkins	Finance (2015)	Committee Member	Cal State San Bernardino
Doug Ayers	Accounting (2015)	Committee Member	Ball State
Mike McDonald	Finance (2014)	Committee Member	Fairfield University
Rob Whited	Accounting (2014)	Committee Member	UMass - Amherst
Jens Schubert	Economics (2013)	Committee Member	VCU
Ronnie Chen	Finance (2013)	Committee Member	Carson Newman College
Ethan Watson (Univ. of Mississippi)	Finance (2013)	Committee Member	University of North Carolina - Willmington
Brett Olsen (Univ. of Missouri)	Finance (2007)	Committee Member	Univ. of Idaho
W.D. Allen (Univ. of Missouri)	Finance (2006)	Committee Member	Univ. of Missouri (instructor)

OTHER SCHOLARLY ACTIVITIES

Taught PhD mini-seminar for University of Paris - Dauphine (2018)
 Taught Asset Pricing course (Masters) at Univ. of Canterbury, New Zealand (2017)
 Discussant at JAAF conference in New Zealand (2017)
 Taught PhD mini-seminar for Hong Kong Polytechnic University (2015)
 Visiting scholar National Chengchi University, Taiwan (May 2015)
 Discussant, Western Finance Association Conference (2015)
 Session Chair, Financial Intermediation Research Society - FIRS (2014)
 Session Chair, FMA European Conference (2013)
 Discussant, FMA European Conference (2013)
 Session Chair, Financial Management Association Meetings (2016, 2014, 2012, 2009)
 Discussant, Financial Management Association Meetings (2014, 2006, 2005, 2004, 2003)
 Discussant, Southern Finance Association Meetings (2004)
 Discussant, Midwest Finance Association Meetings (2004)

Doctoral Consortium Participant (FMA), New Orleans, October 2004
Doctoral Consortium Participant (FMA), Denver, October 2003
Assistant for Georgia Banking School, University of Georgia, 2001-2002