Kenn B. Tacchino, LL.M.
Professor
Accounting, Economics and Finance
School of Business Administration
kbtacchino@widener.edu

Academic Background

LL.M. Widener University School of Law, Tax, 1994.

J.D. Western New England College School of Law, Law, 1982.

B.A. Muhlenberg College, Double Major - Political Science/History, 1979.

Professional Certifications

RICP Designation, 2013

Professional Memberships

Financial Planning Association, 1991-current

American Risk and Insurance Association, 1986-2000

Society of Financial Service Professionals, 1985-current

American Bar Association, 1983-2013

Phi Delta Phi (Legal Honors Fraternity), 1982 -2002

American Society of Pension Professionals and Actuaries

Beta Alpha Psi (Accounting Fraternity)

WORK EXPERIENCE

Academic

Editor, Journal of Financial Service Professionals (August, 2000 - Present), Newton Square, Pennsylvania.

Professor of Taxation and Financial Planning, Widener University (January, 1991 - Present), Chester, Pennsylvania.

Consultant, The American College (1991 - 2013), Bryn Mawr, Pennsylvania.

Associate Professor of Taxation, The American College (January, 1986 - December, 1990), Bryn Mawr, Pennsylvania.

Non-Academic

Pension Technician, Massachusetts Mutual Life Insurance Co. (October, 1983 - December, 1985), Springfield, Massachusetts.

Pension Editor, Prentice-Hall Publishing (September, 1982 - October, 1983), Paramaus, New Jersey.

Head Lacrosse Coach, Western New England College (September, 1979 - May, 1982), Springfield, Massachusetts.

Consulting Experience

2013: Director New York Life Center for Retirement Income at the American College, Ran the New York Life Center for Retirement Income at the American College from 2008-2013. Created a website dedicated to videos for professional financial planners working on retirement planning issues with their clients. We also created retirement planning readings books for financial planners.

2013: Created the RICP designation, Created the RICP (Retirement Income Certified Professional) designation for the American College. It is the fastest growing designation in the history of the financial planning field. It currently has over 11,000 students enrolled soince it was instituted in 2013. I created the curriculum and designed the competencies financial planners need to know to serve the retirement planning needs of their clients.

TEACHING

Courses Taught

Courses from the Teaching Schedule: ???, ECONOMIC SEMINAR IN FIN SERV, FEDERAL INCOME TAX, FIN PLANNING, Insurance Products and Planning, LGL & ETHIC ENVR BUS, PENSIONS & RETIREMENT, PENSIONS & RETIREMENT, Research, Retirement Planning

Teaching Activities

Course Engagement - professional speakers in class

2016 - *Tax and Financial Planning Careers*.

Course Engagement - software

2016 - *Software in graduate and undergraduate capstone classes in financial planning*.

Couse Engagement - experiential learning

2016 - *Fin 497 - Required Internship*.

2016 - *Tax form, research problem, tax issue*.

2016 - *Cases Used*.

Course (New) - Creation/Delivery: Online

2016 - *Three courses taken to a mixed mode format*.

Program Assessment Projects

2016 - *MSTFP close the loop*.

Student Assign-Supervised Research (GRAD)

2016 - *Coauthored and accepted paper -- Strategies for Overcoming the Risks Associated with Aging*. 1 student.

Student Assign-Supervised Research (UG)

2016 - *Accepted paper entitled A Deeper Look at Retirement Planning: Retirement Studies Shed Valuable Light*. 1 student.

Innovations in Course Content / Presentation

2016 - *Mentor Program*.

INTELLECTUAL CONTRIBUTIONS

Category	BDS	AIS	TLS	Total
Articles in Refereed Journals	30	21		51
Publications of Non-refereed or Invited Papers	46			46
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings	8			8
Revisions of Books, Monographs, Compilations, Manuals	1			1
Presentations of Non-Refereed Papers	5			5

Refereed Articles

Applied or Integrative/application Scholarship

Tacchino, K. B. (in press, 2019). By the Numbers 2019. *Journal of Financial Services Professionals*.

Tacchino, K. B. (in press, 2019). The role of a Retirement Plan Specialist. *Journal of Financial Services Professionals*.

Tacchino, K. B. (in press, 2018). How does the Tax Cuts and Jobs Act of 2017 Affect Your Clients. *Journal of Financial Services Professionals*.

Tacchino, K. B. (in press, 2018). Is an IRA Rollover in Your Client's Best Interest. *Benefits Quarterly*.

Tacchino, K. B. (in press, 2018). Retiree Voices Offer Lessons to Planners. *Journal of Financial Services Professionals*.

Tacchino, K. B. (in press, 2018). The Role of the Retirement Planner. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2017). By the Numbers: The 2017 Indexed Pension and Social Security Numbers. *Journal of Financial Services Professionals, 70 (1)*, 7-11.

Tacchino, K. B. (2017). The Health Savings Account Strategy. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2017). Understanding the 72(t) Ten Percent Penalty. *Journal of Financial Services Professionals*.

Tacchino, K. B., & Bojazzi, G. (2016). Strategies for the Risks Associated with Aging. *Journal of Financial Services Professionals, 70 (4)*.

Tacchino, K. B., & Azzollini, D. (2016). A Deeper Look at Retirement Planning: Retirement Studies Shed Valuable Insights. *Journal of Financial Services Professionals, 70 (3)*, 7.

Tacchino, K. B. (2016). Financial Elder Abuse: A Training Curriculum for Financial Planners. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2015). By the Numbers: The 2016 Indexed Pension and Social Security Numbers. *Journal of Financial Services Professionals, 70 (1)*, 7-11.

Tacchino, K. B. (2015). De-Risking--Why a Good Deal for Employers May be a Bad Deal for Your Clients. *Journal of Financial Services Professionals, 69 (5)*, 7-12.

Tacchino, K. B. (2015). The Rollover as Business Start-Up Strategy -- Should Your Client Use Retirement Rollover Funds to Finance aNew Business? *Journal of Financial Services Professionals, 69 (4)*, 7-10.

Tacchino, K. B. (2015). Improving Retirement Security by Reengineering the Summary Plan Description. *Benefits Quarterly, 31*, 45-50.

Tacchino, K. B. (2015). Academic Literature that Financial Service Professionals Can Use. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2015). By the Numbers 2015. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2015). The 2014 JFSP Year in Review. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2014). Recordkeeping for Retirement Starts with MySSA. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2014). Understanding the Qualified-Plan-Administration Landscape. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2013). Why Financial Services? *Journal of Financial Services Professionals, 67 (2)*.

Tacchino, K. B. (2013). Strategy Compilation for a Successful Retirement Income Plan. *Journal of Financial Services Professionals, 67 (1)*, 49-55.

Tacchino, K. B., & Tacchino, P. S. (2013). 25 Factors Influencing the Choice of a Client's Optimal retirement Age. *Benefits Quarterly, 29*.

Tacchino, K. B., Littell, D. A., & Hopkins, J. (2013). By the Numbers 2013. *Journal of Financial Services Professionals*.

Tacchino, K. B., & Gilchrist, N. S. (2012). The 2012 Year in Review. *Journal of Financial Services Professionals*.

Cordell, D. M., Langdon, T. P., & Tacchino, K. B. (2010). Financial Planning Research:Articles That Practitioners Can Use. *Journal of Financial Services Professionals*.

<u>Basic or Discovery Scholarship</u>

Tacchino, K. B., & Wendling, S. (in press, 2018). Strategy: Tax Diversification. *Journal of Financial Services Professionals*, 71-80.

Tacchino, K. B. (2017). Preventing Financial Elder Abuse. *Journal of Personal Finance*.

Tacchino, K. B. (in press, 2017). Taking your Retirement Planning Practice to the Next Level. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2014). Understanding the Retirement Landscape. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2014). myRA. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2013). By the Numbers. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2013). Planning for a Successful Retirement: Overcoming Conventional Wisdom. *Journal of Financial Services Professionals*.

Tacchino, K. B., & Gilchrist, N. G. (2013). The 2013 JFSP Year in Review. *Journal of Financial Services Professionals*.

Tacchino, K. B., Littell, D. A., & Schobel, B. D. (2012). A Decision Framework for Optimizing the Social Security Claiming Age. *Benefits Quarterly*.

Tacchino, K. B., & Littell, D. A. (2012). Post Retirement Security: Mapping Your Client's Concerns and Risks. *Journal of Financial Services Professionals*.

Tacchino, K. B., & Littell, D. A. (2011). By the Numbers. *Journal of Financial Services Professionals*.

Tacchino, K. B., & Littell, D. A. (in press, 2011). By the Numbers 2012. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2011). Enhancing Retirement Security. *Journal of Financial Services Professionals*.

Tacchino, K. B., & littell, D. A. (in press, 2010). By The Numbers. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2010). Choosing the Best Retirement Plan for Supplemental Earnings. *Journal of Financial Services Professionals*.

Littell, D. A., & Tacchino, K. B. (2010). Note to Plan Sponsors: 10 Commonsense Improvements to Enhance Retirement Security for Employees. *Journal of Financial Services Professionals*.

Tacchino, K. B., & Gilchrist, N. G. (2010). The 2010 JFSP Year in Review. *Journal of Financial Services Professionals*.

Tacchino, K. B., & Santomero, N. (2009). 2009 Year In Review. *Journal of Financial Services Professionals*.

Tacchino, K. B., & Littell, D. A. (in press, 2009). Beyond the Numbers: Planning Issues that Make the Qualified Plan Limits Worth Understanding. *Benefits Quarterly*.

Tacchino, K. B., & Littell, D. A. (in press, 2009). By The Numbers: the 2009 Indexed Pension and Social Security Numbers Journal of Financial Service Professional. *Journal of Financial Services Professionals*.

Tacchino, K. B. (in press, 2009). Coping with the great Recession: A To-Do list for retirement planning Professionals. *Journal of Financial Services Professionals*.

Tacchino, K. B. (in press, 2008). By the Numbers: The 2008 Indexed Pension and Social Security Transfers. *Journal of Financial Services Professionals*.

Tacchino, K. B., & Littell, D. A. (in press, 2008). Retirement Security for Women: Understanding The Gender Gap and What To Do About It. *Journal of Financial Services Professionals*.

Tacchino, K. B., & Santomero, N. G. (in press, 2008). The 2008 Year in Review. *Journal of Financial Services Professionals*.

Tacchino, K. B. (in press, 2008). To What Extent Is Your Client Allowed To Be Discrimated Against Because Of Age. *Journal of Financial Services Professionals*.

Santomero, N. G., & Tacchino, K. B. (in press, 2007). The Opportunity for Partial Tax Relief for Homes Sold Within 2 Years of Purchase. *Journal of Personal Finance, 6 (1)*, 14-28.

Tacchino, K. B. (in press, 2007). A different Perspective on the Wobbly Three Legged Stool. *Journal of Financial Services Professionals*.

Tacchino, K. B., & Littell, D. A. (2007). Expanded (Contracted?) Vesting Rules. *Journal of Financial Services Professionals*.

Tacchino, K. B. (in press, 2007). The 2007 Year in Review. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2005). Beyond Retirement Seminars: A Suggested Model for Closing the Knowledge Gap. *Journal of Financial Services Professionals*.

Tacchino, K. B., & Moore, C. (2005). Second Chances: Exceptions to the 60 Day Rollover Rule. *Journal of Financial Planning*.

Tacchino, K. B. (2001). Should Social Security Benefitrs be Included when Projecting Retirement Income. *Journal of Financial Planning*.

Tacchino, K. B., & Slatzman, C. (1999). Are Retirement Accumulation Models Overstating the Financial Resources Needed During Retirement. *Journal of Financial Planning*.

Tacchino, K. B., & Littell, D. A. (1997). Comparing 401(k) Plans with SIMPLEs - Which is Best for Your Organization. *Benefits Quarterly*.

Tacchino, K. B. (1997). Effective Retirement Planning Seminars: Painting by the DOL Numbers. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B., & Thomas, N. D. (1997). Why Financial Practitioners and Geriatric Care Managers Must Talk to Each Other. *Journal of the American Society on Aging*.

Tacchino, K. B. (1995). Behind the Numbers: The Art of Accumulation Planning for Retirement. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B., & Saltzman, C. (1994). Home Sweet Home: Timing the One-Time Tax Exclusion. *Journal of Financial Planning*.

Tacchino, K. B. (1994). Nonqualified Deferred Compensation Plans: Practical and Tax Considerations. *Benefits Quarterly*.

Tacchino, K. B., & Littell, D. A. (1993). The Impact of the Omnibus Budget Reconciliation Act of 1993 on Retirement Planning. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B. (1992). Concerns with Pension Security. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B. (1991). 401(k) or SARSEP - Which Salary Reduction Plan Best Suits Your Needs? *Benefits Quarterly*.

Tacchino, K. B. (1990). Are Plan Loans Approporiate? Regulatory and Practical Considerations. *Benefits Quarterly*.

Tacchino, K. B. (1988). Looking Ahead: The 1989 Nondiscrimination Rules for Qualified Plans. *Benefits Quarterly*.

Non-Refereed Articles

Basic or Discovery Scholarship

Tacchino, K. B. (in press, 2010). Retirement Education. *The Wealth Channel Magazine*.

Tacchino, K. B. (2011). Retirement Summit Identifies Key Competencies Needed for Proper Planning. *The Wealth Channel Magazine*.

Invited Articles/Reviews

Tacchino, K. B. (2010). Retirement Education: better Questions Lead to Deeper Understanding. *The Wealth Channel Magazine*.

Tacchino, K. B. (2009). Retirement planning Ideas: A Better Mousetrap. *The Wealth Channel Magazine*.

Tacchino, K. B. (in press, 2007). By the Numbers. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2006). By the Numbers. *Journal of Financial Services Professionals*.

Tacchino, K. B. (in press, 2006). Room for Improvement: A To-Do List for the Financial Services Industry-- Part I. *Journal of Financial Services Professionals*.

Tacchino, K. B. (in press, 2006). Room for Improvement: A To-Do List for the Financial Services Industry--Part II. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2006). The 2005 Year in Review. *Journal of Financial Services Professionals*.

Tacchino, K. B. (in press, 2006). The 2006 Year in Review. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2005). By the Numbers. *Journal of Financial Services Professionals*.

Tacchino, K. B., & Woerheide, W. J. (2005). Ten Retirement Investment Strategies. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2005). The Retirement Ladder. *Wealth and Retirement Planner*.

Tacchino, K. B. (2004). 2004 Year in Review. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2004). Benefit Changes: Obstacles and Opportunities . *Journal of Financial Services Professionals*.

Tacchino, K. B. (2004). By the Numbers. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2004). Serving Older Clients: Opportunities for Study and Growth . *Journal of Financial Services Professionals*.

Tacchino, K. B. (2004). The Next Evolution in the Discipline of Retirement Planning. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2003). Retirement Planning - The Rest of the Story. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2003). The Year in Review. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2002). Climbing the Hill of Success. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2002). Different Qualified Plan Rules needed for Small Employers. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2002). The Year in Review. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2002). Your Financial Service Practice. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2001). By the Numbers - Post-Tax Reform. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2001). Continuing a Legacy. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2001). Our New Look. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2001). The Need for Retirement Planning as an Employee Benefit. *Journal of Financial Services Professionals*.

Tacchino, K. B. (2001). The Year in Review. *Journal of Financial Services Professionals*.

Tacchino, K. B. (1997). Medical Savings Accounts. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B., Grycewicz, N., Mazzio, M., & Parks, E. (1997). Medicare Reform. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B. (1997). The Pension Simplication Act: Part Two. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B. (1996). Benefits Administration in the 21st Century. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B. (in press, 1996). Cash Balance: The Defined-Benefit Hybrid. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B. (1996). Multiemployer Pension Plans: A Basic Primer. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B. (1996). The Pension Simplication Act: Part One. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B. (1995). Five Reasons to Install, Upgrade or Otherwise Be Content with a Qualified Retirement Plan. *Employee Benefits Journal*.

Tacchino, K. B. (in press, 1995). Overlooked Fringe Benefits for Small Business. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B. (1995). Plan Administration and the VCR Program. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B. (in press, 1995). Solutions to 401(k) Problems. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B. (1994). Qualified or Nonqualified. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B., & DeGenova, N. (1994). SEP or Money Purchase: Which Plan Should Your Client Choose. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B. (1994). Ten-Point Pension Proposal. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B. (1993). Looking Beyond Changes for Opportunities. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B. (1993). Nonqualified Plans: A Good Thing Gets Better. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B. (1993). Seperation, Divorce, and Employee Benefits- Part II. *Journal of The American Society of CLU & CHFC*.

Tacchino, K. B. (1992). In-Service Withdrawals From a Qualified Plan. *Employee Benefits Journal*.

Tacchino, K. B., & Francis, B. C. (1992). Make the Right Decision at Retirement Time: Four Tax and Financial Planning Pointers. *Journal of Accountancy*.

Tacchino, K. B. (1992). New Ground Rules for Pension Plan Investing. *Best's Business Review*.

Tacchino, K. B. (1991). Maximizing Contributions for the Business Owner. *Best's Business Review*.

Tacchino, K. B. (1989). 401(k) Hardship Withdrawals. *Best's Business Review*.

Tacchino, K. B., & Beam Jr., B. T. (1987). Employee Benefits after Tax Reform. *The Practical Lawyer*.

Tacchino, K. B. (1987). Tapping the Group Pension Market on a No-Service Basis. *Life Insurance Selling*.

Tacchino, K. B. (1986). It's Later Than They Think. *Best's Business Review*.

Books, Monographs, Compilations, Manuals

Books

Tacchino, K. B., Littell, D. A., & Schneider, P. J. (2013). *Planning for Retirement Needs, 12th edition* American College.

Tacchino, K. B., & Littell, D. A. (1997). *The Practitioners Guide to Advanced Pension Topics*.

Tacchino, K. B. (1994). *The Vanguard Retirement Investing Guide*.

Tacchino, K. B., Cutler, N., Doyle, R.J., Kurlowicz, T., & Schnepper, J. (1992). *Can You Afford to Retire?*.

Tacchino, K. B., & Kelvin, J. (1991). *Pensions and Profit Sharing, 5th edition* Longman/R&R Newkirk.

Chapters, Cases, Readings, Supplements

Chapters

Tacchino, K. B., & McFadden, J. J. (1993). Nonqualified Retirement Planning. *The Financial Services Professional's Guide to the State of the Art*.

Tacchino, K. B., Crowe, R., & Hughes, C. E. (1992). Retirement Planning. *Fundamentals of Financial Planning*.

Tacchino, K. B., & Leimberg, S. R. (1991). Qualified Plan Changes. *The Financial Services Professional's Guide to the State of the Art*.

Tacchino, K. B., & Leimberg, S. R. (1989). Nonqualified Retirement Planning. *The Financial Services Professional's Guide to the State of the Art*.

Presentations of Non-Refereed Papers

National

Tacchino, K. B. & Cutler, N. (1995). *The Effects of Longevity on Financial Decision Making.* American Society of Aging Annual Conference, Anaheim, California.

Tacchino, K. B. (1996). *Intergenerational Equity: An Analysis of the Tax and Social Security System.* Proceedings of the American Accounting Association, Mid-Atlantic Regional Meeting, Philadelphia, Pennsylvania.

Tacchino, K. B. (1998). *Replacement Ratios .* National Council on Aging Annual Meeting, DC, District of Columbia.

Tacchino, K. B. (2000). *Retirement Planning.* National Council on Aging Annual Meeting, DC, District of Columbia.

Tacchino, K. B. (2004). *Managing Transitions in an Aging Society The Future of Wealth.* Widener University Center on Aging, Chester, Pennsylvania.

SERVICE

Service to the Institution

Department Assignments

Chair:

2018-2019: Accounting Search Committee

Department Assignments

Chair:

2015-2016 – 2016-2017: EFT Department Chair

Department Assignments

Chair:

2018-2019: Economics Search Committee

Mentoring Activities:

2018-2019: Mentor Stephanie Wendling

Department Assignments

Student placements:

2015-2016 – 2016-2017: Sponsor of the Mentor Project for Student Internships

College Assignments

Chair:

2016-2017: Curriculum and Academic Standards

Faculty Advisor:

2018-2019: Advisor to all MSTFP students

Member:

2016-2017: Strategic Planning Committee

2016-2017: Intellectual Review Contributions Committee

2015-2016 – 2016-2017: Graduate Council

2015-2016: Executive Committee

Chair:

2018-2019: Curriculum Committee

College Assignments

Member:

2015-2016 – 2016-2017: Curriculum Committee

College Assignments

Member:

2018-2019: Dean's Advisory Council

College Assignments

Member:

2016-2017: Dean's Search Committee

2016-2017: Intellectual Contributions Committee

2016-2017: Executive Committee

2015-2016 – 2016-2017: Rules Committee

2015-2016 – 2016-2017: Strategic Planning Committee

University Assignments

Member:

2016-2017: Graduate Council

University Assignments

Member:

2018-2019: Widener Day Facilitator

2018-2019: University Promotion and Tenure Committee

Service to the Profession

Editor: Academic PRJ

2019: Journal of Financial Service Professionals (International).

2016: Journal of Financial Service Professionals (National). Started being editor in 2001

Service to the Community

Speech / Presentation at a Community Meeting

2016: MarketWatch Column financial newspaper- Five things to consider before you claim Social Security, All articles were written for MarkeWatch and had many "hits" highest was 87,000 lowest was 3,000.

2016: MarketWatch Column financial newspaper- What you should expect from your retirement planner

2016: MarketWatch Column financial newspaper- 10 things that keep your retirement planner up at night

2015: MarketWatch Column financial newspaper-Draw down strategies: Part 2

2015: MarketWatch Column financial newspaper- Draw down strategies: Part 1

2015: MarketWatch Column financial newspaper- Independent Living

Honors/Awards

Award

2009: , Widener University School of Business.

2007: , Widener University School of Business.

2002: , Widener University School of Business.

1998: , Widener University School of Business.

1997: , CFP Board of Governors.

Honor

2016: Boettner Endowed Professor in Financial Planning, Widener University.

2012: Outstanding Researcher Award Nominee, Widener University.

2000: , Society of Financial Services Professionals.

1998: , Widener University's Pre-Law.

1996: , National Council of Aging.