BLAKE GRAY, Ph.D. CFP®

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EDUCATION

Doctor of Philosophy (Ph.D.) in Personal Financial Planning | *Texas Tech University* **2022**

Master of Business Administration (MBA) in Financial Planning | *California Lutheran University* **2016**

Bachelor of Science (B.S.) in Accounting | *Arizona State University* **2010**

CERTIFICATIONS

Certified Financial Planner™ (2016)

ACADEMIC EXPERIENCE

Assistant Professor | *Kansas State University* **Jan 2023 - Present**

- Teaching financial counseling and communication, well-being – money and meaning, Ph.D. research cluster, and experimental research design classes.
- Research cluster created with an emphasis in experimental design and helping the students to make the most out of their project by facilitating their passion, sharpening their theoretical basis, and providing multiple perspectives for sound analysis and discussion
- Continued responsibility to lead financial literacy initiative as it expands modality and reach

Professor of Practice | *Kansas State University* **Aug 2022 – Dec 2022**

- Developed flipped classroom content, redesigned curriculum, created engaging presentations and led financial counseling class for 30+ students
- Led two sections of the introduction to financial planning class for 75+ students, typically non-major students on the major topics of financial planning from budgeting to estate planning
- Helped non-degree students find financial planning as a profession and degree
- Created content and oversaw university-wide financial literacy initiative classes for over 120+ students as the first step in a multiyear initiative for every student to receive financial literacy in their first two years
    - Responsibilities include training and leading an RA and TA to oversee classes and support content development as well as coordinate efforts between Powercat Financial, the business school, PFP department, dean of students, vice president for student well-being, and other stakeholders
- Co-taught experimental design course for Ph.D. students and worked with students to create research proposals and develop surveys
- Worked with faculty toward publications and accepted dissertation committee commitment for several students

Capstone Instructor of Record | Texas *Tech University* **Aug 2021 – May 2022**

- Selected to teach the capstone course for 40+ students in the Personal Financial Planning program
- Trained students to create a financial plan that demonstrates knowledge of the financial planning curriculum, show reasoning and logic in analysis of hypothetical client needs, and present detailed, justified, and explained recommendations

Instructor of record – SIE Preparation | *Texas Tech University* **Jan 2019 – May 2019**

- Piloted the first offering of the SIE prep class at Texas Tech University

Research Assistant | *PhD in Personal Financial Planning - Texas Tech University* **Aug 2018 – Aug 2021**

- Collaborated to create, distribute, and analyze experimental survey to 1000 participants
- Assisted with grant application development and submission process for five separate grants
- Presented at conferences on the topics of financial planning for families with autism, positive psychology, and the impact that investment choices between spouses has on financial satisfaction

COMMUNITY INVOLVEMENT

Financial Literacy in MHK **Aug 2023 – Dec 2023**

- Worked with Habitat for Humanity to create a financial literacy course for current and future clients

- Training and prepared students to lead presentations and one-on-one discussions

Member & Officer | *KEY (Knowledge Empowering You)* **Aug 2019 – May 2022**

- Created financial education presentations on topic areas including identify theft, budgeting, and credit repair
- Engaged with the Lubbock community through financial literacy presentation and programs
- Supported KEY administration by mentoring students, presenting with junior members, and connecting with community leaders

CAMPUS LEADERSHIP

Director of Inaugural Financial Planning Academy at Kansas State funded by Charles Schwab **2023-present**

- **Managed a week-long financial planning camp for 26 students and 7 student workers that grew to 44 students in 2024.**

Powercat Financial Education Faculty **2022 to present**

- Piloted cooperative effort to provide financial literacy to all students at Kansas State
- Developed curriculum, presentations, and lessons plans for faculty and colleges across campus
- Led presentations for 2,196 students in Fall 2023

Peer-Reviewed Journal Articles

Staples, T. M., Rollins-Koons, A., Anderson, G. J., & Gray, B. (2023) Canadian Retirement Planning Behavior: How Reliance on a Government Pension Relates to Pre-Retirement Savings and Planning Behaviours. *Financial Planning Research Journal*, *9*(1), 1-18.

Gray, B. T., Liu, Y., & Asebedo, S. D. (2020). Household agreement and financial satisfaction: A bargaining perspective. *Applied Economics Letters*, 1-10.

Gray, B. T. (2022). *Three Essays on Women as Primary Investors in the United States of America* (Doctoral dissertation).

Archuleta, K. L., Asebedo, S. D., Durband, D. B., Fife, S., Ford, M. R., Gray, B. T., ... & Sheridan, G. (2021). Facilitating virtual client meetings for money conversations: A multidisciplinary perspective on skills and strategies for financial planners. *Journal of Financial Planning,* 34(4), 82-101.

Asebedo, S. D., Seay, M. C., Little, T. D., Enete, S., & Gray, B. (2020). Three good things or three good financial things? Applying a positive psychology intervention to the personal finance domain. *The Journal of Positive Psychology*, 16(4), 481-491.

Asebedo, S. D., Liu, Y., Gray, B., & Quadria, T. H. (2020). How Americans used their COVID-19 economic impact payments. *Financial Planning Review*, 3(4), e1101.

Asebedo, S. D., Quadria, T. H., Gray, B., & Liu, Y. (Accepted for publication 10/18/2021). The psychology of COVID-19 economic stimulus relief use. *Journal of Family and Economic Issues*.

Lim, H., & Gray, B., (2022). Cultural Diversity and Risk Management. Understanding cultural and religious taboos helps planners overcome clients' reluctance to make insurance decisions. *Journal of Financial Planning,* 35(11), 52-56.

PRESENTATIONS

Asebedo, S. D., Seay, M. C., Enete, S., & Gray, B.* (2019). *A positive psychology intervention for happiness, financial satisfaction, and financial self-efficacy*. Paper presented at the 2019 Financial Planning Association (FPA) annual conference academic track, Minneapolis, MN. (9 out of 25 papers accepted.)

Archuleta, K. L., Asebedo, S. D., Durband, D. B., Fife, S. T., Ford, M. R., Gray, B. T.*, Lawson, D. R., Lurtz, M. R., McCoy, M. A., Pickens, J. C., & Sheridan, J. (2020). Facilitating *virtual* client meetings for money conversations: Skills, strategies, and outcomes. (Equal authorship contribution in alphabetical order.) Paper presented at the 2020 Financial Planning Association (FPA) annual conference academic track (virtual).

Gray, B.* & Lauderdale, M. (2019). *Financial planning for families with Autism*. Paper presented at the 2019 Burkart Center Research Symposium, Lubbock, TX.

Archuleta, K. L.*, Asebedo, S. D.*, Gray, B.*, Lawson, D. R.*, McCoy, M. A.*, Pickens, J. C.*, & Sheridan, J.* (2021). *Facilitating Virtual Client Meetings for Money Conversations*: *A Multidisciplinary Perspective*. Financial Therapy Association Educational Webinar (virtual).

Gray, B.*, Liu, Y., & Asebedo, S. D. (2019). *The relationship between household agreement and financial satisfaction*. Poster presented at the 2019 Academy for Financial Services (AFS) annual conference, Minneapolis, MN.

Shen, L.*, Gray, B., & Asebedo, S. D. (2019). *The impact of social support on financial satisfaction for senior couples*. Poster presented at the 2019 Academy for Financial Services (AFS) annual conference, Minneapolis, MN.

Gray, B.* (2022) *Thinking slow in fast times. Behavioral finance and applications for planners.* Presentation for the FPA of Kansas chapter meeting in Wichita, KS.

(* denotes presenter)

TEACHING EXPERIENCE

Kansas State University

HHS 300: Money and Meaning

Fall 2023, 4.60 out of 5.00
Spring 2024 (online), 4.80 out of 5.00
Spring 2024, (in-person) 4.50 out of 5.00

PFP 105: Introduction to Personal Financial Planning

Fall 2023, 4.60 out of 5.00
Fall 2022, 4.90 out of 5.00
Fall 2022, 4.40 out of 5.00

PFP 320: Applications of Behavioral Finance

Spring 2023, 4.80 out of 5.00

PFP 595: Capstone in Personal Financial Planning

Spring 2023, 3.10 out of 5.00

DHE 195: Psychology of Money

Fall 2023, 5.00 out of 5.00

PFP 456: Financial Counseling and Communication

Fall 2022, 4.90 out of 5.00

Texas Tech University

PFP 5373: Capstone in Personal Financial Planning

Spring 2022, 5.00 out of 5.00
Fall 2021, evaluation not available

SIE Preparation

Spring 2019, evaluation not available

GRADUATE STUDENT ADVISING

Co-Chair:

Greg Anderson	Ph.D., Personal Financial Planning	Expected 2026
Tannya Staples	Ph.D., Personal Financial Planning	Expected 2026
Lena Gan	Ph.D., Personal Financial Planning	Expected 2024

Committee

Matthew Mizuta	Ph.D., Personal Financial Planning	Expected 2024
Daniel Yerger	Ph.D., Personal Financial Planning	Expected 2024

Outside Chair

Cory Thompson	Ph.D., Personal Financial Planning	Graduated 2024