MEGAN MCCOY, PHD, LMFT, AFC®, CFT™
Assistant Professor
Kansas State University
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Education

2016	University of Georgia, Athens, GA Ph.D. Human Development and Family Science, Marriage and Family Therapy Dissertation: Financial boundary ambiguity in military couples
2008	Drexel University, Philadelphia, PA M.A. in Couple and Family Therapy Thesis: Exploring the context of self-care for youth in military families
2005	University of North Carolina at Chapel Hill, NC B.A. in Psychology

Academic Experience

2022 - present	Assistant Professor Department of Personal Financial Planning Kansas State University Manhattan, KS
2019 - 2022	Professor of Practice Department of Personal Financial Planning Kansas State University Manhattan, KS
2017 - 2018	Lecturer Department of Personal Financial Planning Kansas State University Manhattan, KS
2016 - 2018	Adjunct Faculty and IRB Reviewer Department of Marriage and Family Therapy Northcentral University (National University) San Diego, CA

Fall 2010	Instructor of Record CHFD 4870: Human Sexuality across the Life Span Department of Child and Family Development University of Georgia Athens, Georgia

Licenses/Accreditations

2021 - Present	Accredited Financial Counselor®
2021 - 2021	Fundamentals of True Wealth Planning, Money Quotient
2019 - Present	Certified Financial Therapist™
2015 - Present	Marriage and Family Therapy License in South Carolina and Georgia
2014 - 2015	DIR/Floortime Certified
2012 - Present	Certified Therapist in Eye Movement Desensitization and Response

Clinical Experience

2016 - 2017	Family Therapist, Firm Foundations Counseling and Wellness, Columbia SC
2014 - 2015	Family Therapist, The Community School, Atlanta, GA
2009 - 2013	Family Therapist, Aspire Clinic, Athens, GA
2008 - 2009	Family Therapist, United Family Services, Monroe, NC
2006 - 2008	Family Therapist, NET Outpatient, Philadelphia, PA

Grant and Contract Awards (Funded)

McCoy, M. [PI]. (2024). Exploring the efficacy of Intuit's financial education curriculum. Intuit. Requested Award Amount: $100,000.

McCoy, M. [Co-PI], Lawson, D., & Watkins, K. (2023-2024). Exploring retention efforts within financial planning for diverse groups. Center for Financial Planning Board. Award Amount: $47,917.

[*] **McCoy, M. [Co-PI],** Wu, J., & Lawson, D. (2022-2023). Exploring financial planning technology in light of COVID-19. Financial Planning of Canada. Award Amount: $25,000 CAD.

McCoy, M. [PI]. (2022-2023). Course Development PFP 300 Love and Money. Global Campus Course Development Grant. Kansas State University. Requested Award Amount: $9,000.

Reiter, M., Watkins, K., **McCoy, M. [Co-I]**, White, K., & Jurgenson, J. (2021-2022). The KMSI relationship to financial literacy and cross-racial validity. The National Endowment for Financial Education. Award Amount: $111,417.00.

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* Indicates Doctoral Student Participation
** Indicates Master Student Participation
*** Indicates Undergraduate Student Participation

McCoy, M. [Co-PI], Lawson, D., Sharpe, D., & Anderson, C. (2021-2022). Developing and maintaining client trust & commitment. Financial Planning Association. Award Amount: $20,000.

McCoy, M. [Co-PI] & Steuve, C. (2020-2021). Open Textbook Initiative for PFP 105. The Open/Alternative Textbook Initiative Grant. Kansas State University. Award Amount: $5,000.

Grant Awards (Not Funded)

McCoy, M. [Co-PI], Johnston, C., Anders, K., & Ferraro, A. (2024-2025). A transdisciplinary examination of queer individuals' well-being and identity in light of transition to parenthood. Exploratory/Developmental Research Grant (EDRG) Award. Kansas State University. Requested Award Amount: $10,000 .

McCoy, M. [Co-PI], Kiss, E., White, K., Ouyang, C., Zhang, Y., & Joseph, M. (2023-2024). Quality over quantity? Assessing the relative influence of financial education on financial literacy, financial well-being, and anxiety. The National Endowment for Financial Education. Requested Award Amount: $126,500.00.

Francois, J., Garcia, B., Johannes, E., Mallon, B., Markham, M., Topham, G., Fox, A., Kaup, M., Besenyi, G., Mailey, E., Stoepker, P., Kiss, E., **McCoy, M. [I]**, Kirchmer, K., Bernick, E., Heidbreder, B., Kurtz, D., Mulcahy, E., Logan, C., & Rall, A.D. (2022-2023). Transdisciplinary Place-Making for Health Equity for Kansans. Kansas State University Game-changing Research Initiation Program. Requested Award Amount: $300,000.00

Muruthi, B., Watkins, K., **McCoy, M. [Co-I]**, & White, K. (2022-2023). Transnational social capitalism: Perceived racism on remittance behaviors and well-being of Black immigrants. Russell Sage Grant. Requested Award Amount: $50,000.

Muruthi, B., Watkins, K., **McCoy, M. [Co-I]**, & White, K. (2021-2022). The impact of remittance behavior on socioeconomic conditions and mental health in Black immigrant families. The U.S. Washington Center for Equitable Growth Grant. Requested Award Amount: $100,499.

Ross, D.B., Wood, N., & **McCoy, M. [Co-PI]**. (2020-2021). More than financial literacy: The role of narrative financial therapy in implementing lasting financial management. Kazanjian Economics Foundation. Requested Award Amount: $192,000.

Textbook and Teaching Manual

Byram, J.L., **McCoy, M.,** Kruger, M., & Grable, J. (2023). *Financial Planning Counseling Skills*. National Underwriter Company.

Peer-Reviewed Journal Articles

* Rollins-Koons, A., Lawson, D., **McCoy, M.,** Wu, J., Anderson, J., & Ludwig, E. (in press). Exploring the relationships between virtual client meetings, financial anxiety, and trust in financial planning. *Financial Planning Research Journal.*

[*] **McCoy, M.** & Rollins-Koons, A. (In press). Building trust, commitment, and satisfaction through effective intersession communication: The moderating effect of financial anxiety. *Journal of Financial Planning.*

Pearson, B., & **McCoy, M.** (2024). Having a significant other reduced financial strain during the COVID-19 pandemic. *Journal of Financial Counseling and Planning*, 35(2), 202-214.

White, K., Olajide, O., Watkins, K., Reiter, M., Johnson, P., & McCoy, M. (2024). Financial education and financial anxiety: Do quality and quantity differ? *Journal of Financial Counseling and Planning*, 35(2), 276-291.

McCoy, M., Watkins, K., White, K., Kahler, R., & Reiter, M. (2024). The importance of the "client" experience for financial planning students: A qualitative inquiry of themes. *Journal of Financial Counseling and Planning*, 35(2), 264-275.

[*] Watkins, K., Choi, S., Reiter, M., **McCoy, M.,** Smodic, S., & Thompson, C. (2024). U.S. Black adults' estate planning: The role of financial planner use, inheritance receipt, and life insurance ownership. *Financial Planning Review,* e1181, 1-16.

[**] Eckert, S. & **McCoy, M.** (2024). The benefits of behavioral nudges: Using choice architecture to improve decisions and shape outcomes in retirement savings programs. *Journal of Financial Planning,* 37(3), 72-86.

[*, **] Collier, N., Anderson, J. N., Carroll, D., & **McCoy, M.** (2024). Comparative perspectives on virtual financial planning: Similarities and differences between planner and client's assessments of virtual client meetings. *Journal of Financial Planning*, *37*(4), 58-73.

[*] **McCoy, M.**, Molchan, S., Archuleta, K., & Ponciano, I. (2023). You are your best intervention: Utilizing person-of-the-therapist training in financial therapy. *Journal of Financial Therapy,* 14(2), 10-25.

[*] Harris, J., White, K., **McCoy, M.,** & Liu, Y. (2023). College student financial well-being: A reexamination of cross-racial and ethnicity differences. *Journal of Personal Finance,* 22(2), 51-65.

White, K. J., **McCoy, M**., & Love, K. (2023). The majors of transgender and gender diverse college students. *Journal of LGBT Youth,* 1-12.

[*, **] Russell, M., Anderson, J., Unruh, C., Varady, K., Walters, J., & **McCoy, M.** (2023). Improving college financial decision-making. *Journal of Financial Service Professionals, 77*(5), 1-21.

[*] Watkins, K., **McCoy, M**., White, K., Reiter, M., & Liu, Y. (2023). Exploring the role of financial socialization on financial planning students' financial and career confidence: A thematic analysis. *Journal of Family and Economic Issues*, 1-11.

[*] Ludwig, E., Heckman, S., & **McCoy, M. (**2023). The influence of risk, financial literacy, and trust on financial advice-seeking behavior in a cross-racial examination. *Journal of Financial Planning.* 36(1), 68-85.

[**] Prelogar-Hernandez, G., **McCoy, M.**, Lurtz, M., & White, K. J. (2022). Promoting inclusion in your practice for transgender and gender non-conforming clients: Utilizing the inclusive financial well-being empowerment model. *Journal of Financial Therapy*, *13*(2), 2.

[*] **McCoy, M.**, Machiz, Harris, J., Lynn, C., Lawson, D., & Rollins-Koon, A. (2022). The science of building trust and commitment in financial planning: Using structural equation modeling to examine antecedents to trust and commitment. *Journal of Financial Planning, 35*(12), 68-68.

White, K. J., Love, K., **McCoy, M.,** Reiter, M., Seponski, D. M., Koposko, J., & Regan, E. (2022). Factors associated with the financial strain of transgender and gender diverse college students. *Journal of Consumer Affairs*. 1-21

[*, ***] Anderson, J., Wu, J.C., Rollins-Koon, A., Azaloff, S., McCaleb, R., Rauh, C., & **McCoy, M.** (2022). A decade of research in the *Journal of Financial Planning*. *Journal of Financial Planning. 35*(9), 70-81.

[*] Enete, Seay, M., Asebedo, S., Wang, D. & **McCoy, M.** (2022). The relationship between emotions and financial time horizon. *Journal of Personal Finance, 21*(1), 93-112.

[*] Enete, S., Seay, M., Asebedo, S., Wang, D., & **McCoy, M.** (2022). Personal emotions and family financial well-being: Applying the broaden and build theory. *Journal of Financial Counseling and Planning*, *33*(1), 79-96.

[*] Enete, S., Seay, M., Asebedo, S., Wang, D., & **McCoy, M.** (2022). Understanding the influence of emotion on both time and money: applying the broaden and build theory. *SN Business & Economics*, *2*(5), 1-24.

[*] White, K. J., Ouyang, C., Machiz, I., **McCoy, M.,** & Qi, J. (2022). An application of financial resilience to retirement planning by racial/ethnic status. *The Journal of Retirement*, 9(4), 31-45.

[*, **] Biever, D. F., Patel, N., Agnew, A., Kopp, D., Krausman, J., & **McCoy, M.** (2021). When money can't be avoided: Helping money avoidant widows using the changes and grief model. *Journal of Financial Therapy*, *12*(2), 2.

[**] Sterbenz, E., Ross, D., Melton, R., Smith, J., **McCoy, M.,** & Pearson, B. (2021). Using scaffolding learning theory as a framework to enhance financial education with financial planning clients. *Journal of Financial Planning.*

[*] Sensenig, D. J., Lurtz, M., Joseph, M., Harris, J., White, K. J., & **McCoy, M.** (2021). CFP board anonymous case histories: Ethical themes of compensation disclosure. *Financial Planning Review*, e1126.

[*] White, K.J., **McCoy, M.**, Watkins, K., Chen, X., Koposko, J., & Mizuta, M. (2021). 'We don't talk about that': Exploring money conversations of Black, Hispanic, and White households." *Family & Consumer Sciences Research Journal,* 49(3), 328-343.

[†]Archuleta, K. L., Asebedo, S. D., Durband, D. B., Fife, S. T., Ford, M. R., Gray, B. T., Lurtz, M. R., **McCoy, M.,** Pickens, J. C., & Sheridan, J. (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.

[†] Equal authorship contribution in alphabetical order

White, K. J., **McCoy, M.**, & Watkins, K. (2021). Resource management: Environmental sustainability across the financial literacy curriculum. *Journal of Family & Consumer Sciences Education*, *38*(1), 24-40.

*, ** Harris, J., Stephens, R., Sensenig, D., Pickard, S., **McCoy, M.,** & Kahler, R. (2021). Integrating financial therapy within family-owned businesses: A theoretical case vignette with recommended strategies for consulting with copreneurs. *Journal of Financial Therapy, 11(2)*, 1.

* Muruthi, B., Watkins, K., **McCoy, M.**, White, K., Stafford McRell, A., Thomas, M., & Taiwo, A. (2021). "Save, even if it's a penny": Transnational financial socialization of Black immigrant women. *Journal of Financial Therapy*, 11(2), 3.

White, K., Watkins, K., **McCoy, M.,** Muruthi, B., & Byram, J.L. (2021). How financial socialization messages relate to financial management, optimism and stress: Variations by race. *Journal of Family and Economic Issues,* 42(2), 1-14.

McCoy, M., O'Neal, C.W., Gale, J., Goetz, J., & Mancini, J. (2020). Financial boundary ambiguity in military spouses. *Family Relations,* 7(4), 65-1279.

* Sensenig, D.J., Walsh, B., Machiz, I., Stanley, N., Russell, M., & **McCoy, M.** (2020). Utilizing what we know about tele-mental health in tele-financial planning: A systematic literature review. *Journal of Financial Planning,* 36(9), 48-61.

*, **Glenn, C.E., Caulfield, B., **McCoy, M.**, Curtis, J., Gale, N.C., & Astle, N. (2020). An annotated bibliography of financial therapy research: 2010 to 2018. *Journal of Financial Therapy,* 10(2), 1.

* White, K.J., **McCoy, M.,** & Chen, X. (2020). Exploring the impact of marital status on financial conversations. *Journal of Financial Therapy,* 10(2), 2

** Tennereli, D., Weaver, S., **McCoy, M.,** & Astle, N. (2020). Scaffolding versus enabling: Financially supporting adult children. *Journal of Financial Therapy,* 10(2), 4.

Lucier-Greer, M., **McCoy, M.,** Gale, J., Goetz, J., & Mancini, J. (2019). Exploring the context of self-care for youth in military families. *Journal of Youth and Adolescence.* 108, 5991-5999.

* White, K.J., **McCoy, M.**, Love, K., Kwak, E.J., Bruce, E., & Grable, J. (2019). The role of signaling when promoting diversity and inclusion at the firm level: A financial advisory professional case study. *Advances in Business Research.* 9(1), 1-16.

McCoy, M., White, K.J., & Love, K. (2019). Exploring the financial overconfidence of student-athletes. *Business and Management: an International Journal.* 9(4), 381-398.

** Smodic, S., Rauschenberger, J., Watts, E., & **McCoy, M.** (2019). Financial planning with ambiguous loss from Alzheimer's disease: Implications, application and interventions. *Journal of Financial Planning,* 32(8), 34-45.

** Begina, M., Hickingbottom, J., Lutrell, E.G., & **McCoy, M.** (2018). Identify and understand clients' money scripts: A framework for using the KMSI-R. *Journal of Financial Planning,* 31(3), 46-55.

White, K. J., **McCoy, M.,** & Watkins, K. (2018). Exploring the relationship between sustainability and personal finance practices. *Forum for Family and Consumer Issues,* 22(1), 1-12.

Muruthi, B., **McCoy, M.,** Chou, J., & Farnham, A. (2018). Sexual scripts and narrative therapy with older couples. *The American Journal of Family Therapy*, 46(1), 81-95.

Muruthi, B., Watkins, K., **McCoy, M.**, Muruthi, J.R., & Kiprono, F.J. (2017). "I feel happy that I can be useful to others": Preliminary study of East African women and their remittance behavior. *Journal of Family Economic Issues,* 38(3), 315-326.

Abrams, B., Rush, K., Bermudez, M., **McCoy, M.,** & Stinson, M. (2016). Afro-Caribbean mothers in the U.S.: An exploratory study from a transnational feminist perspective. *Women and Therapy*, 3-4, 413-431.

Muruthi, B.A., Nasis, T., Jordan, L.S., **McCoy, M.**, Grogan, C., & Farnham, A. (2015). Collaborative therapy approach: Implications for working with Afro-Caribbean families coping with infidelity. *Journal of Systemic Therapies,* 34(3), 26-43.

Asebedo, S., **McCoy, M.**, & Archuleta, K. L. (2014). 2013 membership profile of the Financial Therapy Association: A strategic planning report. *Journal of Financial Therapy*, 4(2), 1-21.

McCoy, M., Ross, D. B., & Goetz, J. (2014). Narrative financial therapy: Integrating a financial planning approach with therapeutic theory. *Journal of Financial Therapy, 4(2*), 22-42.

Stinson, M., George, D.V., **McCoy, M.,** Hjelmstad, L., Mennenga, K.D., & Bermudez, J.M. (2013). Finding your cadence: Introducing the dynamic developmental framework of supervision. *Journal of Systemic Therapies,* 32(4), 19-32.

McCoy, M., Ross, B., Hjelmstad, L., & Stinson, M. (2013). Who's in our clients' bed? A case illustration of sex therapy with a polyamorous couple**.** *Journal of Sex and Marital Therapy, 41*(2), 134-144.

McCoy, M., Hjelmstad, L., & Stinson, M., (2013). The role of tele-mental health in therapy for couples in long-distance relationships. *Journal of Couple and Relationship Therapy,* 12(4), 339-358.

McCoy, M., Gale, J., Ford, M., & McCoy, R. (2013). A therapist's perspective of a financial planning course: Implications for financial therapy education and training. *Journal of Financial Therapy,* 4(1), 21-38.

McCoy, M., Stinson, M., & Bermudez, J. M. (2013). Utilizing a narrative approach to increase intimacy after prostate cancer. *Journal of Creativity in Mental Health*, 8(1), 48-69.

White Papers

* **McCoy, M.,** & Wu, J., Lawson, D., Rollins-Koons, A., Anderson, J., & Ludwig (E.). (2024). Exploration of the use of technology in financial planning. [White Paper]. FP Canada. https://static1.squarespace.com/static/64c7e096e5d5186500621504/t/6630f1e95cbf871fe4197a51/1714483690498/cffp-ksu-en-use-of-technology-paper.pdf

* Anderson, C., Deanna, S.L., **McCoy, M.**, & Lawson, D. (2022). Developing and maintaining client trust and commitment in a rapidly changing environment. [White Paper]. Financial Planning Association. https://www.financialplanningassociation.org/learning/research/client-communication

Invited Articles

* Hadjian, A., **McCoy, M.,** & Lurtz, M. (2024). The role of self-disclosure for financial planners. *Journal of Financial Planning*, 37(1), 76-85.

Johnson, P., **McCoy, M.**, Watkins, K., & White, K. (2023). Encouraging money conversations among Black, Hispanic, and White households: Lessons for FCS professionals. *Journal of Family & Consumer Sciences,* 115(4), 30-35.

Lim, H. & & **McCoy, M.** (2023). Couples and insurance: How to communicate with couples regarding insurance decisions over mortality, longevity, and long-term care risks. *Journal of Financial Planning.* 50(71), 68-23.

*, ** Carroll, D., Hadjian, A., Collier, N., & **McCoy, M.** (2023). Disability insurance: The financial planning industry's great blind spot. *Journal of Financial Planning, 36*(7)*,* 54-64.

** Gillo, R., Varani, L., Pearson, B., & **McCoy, M.** (2023). 'I'm just bad with money': How Self-fulfilling prophecy shapes financial behaviors. *Journal of Financial Planning.* 36(4), 62-70.

* Lurtz, M. & **McCoy, M., &** Smodic, S. (2019). Ambiguous loss: Helping clients to grieve even before a loved one passes away. *Kitces Nerd's Eye View*. Retrieved from https://www.kitces.com/blog/ambiguous-loss-grief-incapacity-planning/

Peer-Reviewed Book Chapters

*, *** **McCoy, M.,** Rollins-Koons, A., & Liniger, F. (In press). Emerging adults' financial skills. In A. LeBaron-Black, H. Kelley, & A. Sorgente (Eds.). *Flourishing and Floundering Financially in Emerging Adulthood: A Handbook.* Oxford University Press.

McCoy, M. & Van Zutphen, N. (2022). Developing a productive client-planner relationship that addresses the psychological elements of financial planning. In. S. Chatterjee, S. Lutter, & Yeske, D. (Eds.), *Psychology of Financial Planning* (pp. 19-39). ALM.

McCoy, M. & Lurtz, M. (2022). Identifying and responding to client values and goals. In. S. Chatterjee, S. Lutter, & Yeske, D. (Eds.), *Psychology of Financial Planning* (pp. 40-54). ALM.

Davis, S.D., Lurtz, M., & **McCoy, M.** (2022). Identifying when money is being used as manipulation. In. S. Chatterjee, S. Lutter, & Yeske, D. (Eds.), *Psychology of Financial Planning* (pp. 183-198). ALM.

Koochel, E., **McCoy, M.** & Davis, S.D. (2022). Applying financial counseling skills to the financial planning process. In. S. Chatterjee, S. Lutter, & Yeske, D. (Eds.), *Psychology of Financial Planning* (pp. 201-219). ALM.

McCoy, M. & Lutter, S. (2022). Forging trusting relationships. In. S. Chatterjee, S. Lutter, & Yeske, D. (Eds.), *Psychology of Financial Planning* (pp. 221-235). ALM.

Lutter, S., **McCoy, M.,** Davis, S.D., & Palmer, L. (2022). Navigating change. In. S. Chatterjee, S. Lutter, & Yeske, D. (Eds.), *Psychology of Financial Planning* (pp. 259-274). ALM.

McCoy, M. & Lutter, S. (2022). The necessity of empathy. In. S. Chatterjee, S. Lutter, & Yeske, D. (Eds.), *Psychology of Financial Planning* (pp. 275-286). ALM.

* Harris, J., Machiz, I., Joseph, L., & **McCoy, M.** (2021). Emergent financial literacy. In *Socialization, Financial Literacy, and Social Education*. Abington, UK: Routledge.

Muruthi, B.A.**, McCoy, M.**, & Farnham, A. (2016). Triangulation in the family. In J. LeBow, A. Chambers & D.C. Breunlin (Eds.), *Encyclopedia of Couple and Family Therapy* (pp. 1-4). Springer Publishing.

Gale, J., Ross, D.B., & **McCoy, M.** (2016). Training the narrative therapist. In K. Jordin (Ed.), *Couple, Marriage, and Family Therapy Supervision* (pp. 289-308). Springer Publishing.

McCoy, M., Ross, D.B., & Goetz, J.W. (2015) Narrative financial therapy. In B.T. Klontz, S.L. Britt & K.L. Archuleta (Eds.), *Financial Therapy* (pp. 235-252). Springer Publishing.

Book Review

McCoy, M. & Ross, B. (2013). Financial therapy: 5 steps toward financial freedom. *Journal of Financial Therapy,* 4(1). 94-98.

McCoy, M., Gale, J. & Kim, J. (2011). MFT researcher interviews. *Journal of Marital and Family Therapy,* 37(3), 273-375.

Conference Papers, Posters, and Presentations

Johnson. PL., Russell, M., Watkins, K., **McCoy., M.** (June 2024). Personal Finance & Financial Stress: Case Studies for Educators and Practitioners. International Federation for Home Economics. IFHE 2024 Symposium. Galway, Ireland.

* **McCoy, M.** & Rollins-Koon, A. (May 2024). Intersession communication and the impact on trust mediated by financial anxiety. Research Presentation at the Annual Financial Therapy Association Conference. San Diego, CA.

Watkins, K., Akinde, M., Olamide, O., Joseph, M., **McCoy, M**. and White Jr., K. (May 2024). “Who Can I Turn To?”: Examining the Intersectionality of Chosen Kin and Race on Financial Discussions Within Couples. Poster presentation at 2024 Financial Therapy Conference, San Diego, CA.

McCoy, M., White, K., & Watkins, K. (May 2024). An Examination of the KMSI-R Using a Diverse Sample. Research Presentation at the Annual Financial Therapy Association Conference. San Diego, CA.

** Dow, K. & **McCoy, M.** (May 2024). Preparing Couples for Parenting: An Introduction to Tools that Mitigate Financial Stress and Improve Couple’s Communication. Research Presentation at the Annual Financial Therapy Association Conference. San Diego, CA.

* Nasima, K. & **McCoy, M.** (December 2023). The role of financial literacy in improving financial well-being. Research Presentation at the Center for Financial Planning’s Academic Research Colloquium. Washington, DC.

Zhang, Y., **McCoy, M.**, & Joseph, M. (December 2023). A comparative study of planners ’and clients ’perspectives on value. Research Presentation at the Center for Financial Planning’s Academic Research Colloquium. Washington, DC.

* Rollins-Koons, A., Lawson, D., **McCoy, M.,** Wu, J., Anderson, J., & Ludwig, E. (December 2023). Exploring the relationships between virtual client meetings, financial anxiety, and trust in financial planning. Research Presentation at the Center for Financial Planning’s Academic Research Colloquium. Washington, DC.

* Antonoudi, E., Machiz, I., Russell, M., **McCoy, M.,** & White, K. (October 2023). Literacy and retirement planning's impact on overall well-being. Poster Presentation for the Financial Management Association International Conference. Chicago, IL.

** Ross, B., **McCoy, M.**, & Page, B. (October 2023). All's fair in love and chores: Examining relational and psychological dynamics when women make more than men. Research Presentation at the Annual Financial Therapy Association Conference. Charlotte, NC.

* **McCoy, M.,** Molchan, S., Ponciano, I., & Archuleta, K. (October 2023). How being you impacts your work: a live demonstration of person of the therapist genogram exploration. Research Presentation at the Annual Financial Therapy Association Conference. Charlotte, NC.

Olajide, O., Watkins, K., White, K., Reiter, M., Johnson, P., & **McCoy, M.** (September 2023). The Strength of perception of financial education quality on financial stress and anxiety. Research Presentation at the Academy of Financial Services Annual Conference. Phoenix, AZ.

McCoy, M. (September 2023). Financial therapy tools to foster trust and commitment in your clients: An introduction for financial planners. Research Presentation at the Academy of Financial Services Annual Conference. Phoenix, AZ.

* Wu, J., Machiz, I., **McCoy, M.,** Rollins-Koons, A., & White, K. (September 2023). The financial anxiety barbell curve: how too much or too little financial anxiety impacts a client’s trust in and commitment to their planner. Research Presentation at the Academy of Financial Services Annual Conference. Phoenix, AZ.

* Collier, N., Anderson, J., Carroll, D. & **McCoy, M.** (September 2023). Comparative perspectives on virtual financial planning. Research Presentation at the Academy of Financial Services Annual Conference. Phoenix, AZ.

* **McCoy, M.,** Machiz, I., Johnson, P., White, K., Watkins, K., & Bennetts C. (September 2023). Resilient personality or financial resilience framework for coping with physical and mental health during the COVID-19 pandemic. Research Presentation at the Academy of Financial Services Annual Conference. Phoenix, AZ.

* Machiz, I., **McCoy, M.,** Wu, J., Rollins-Koons, A., & White, K. (September 2023). Examining anxiety as an additional antecedent to trust and commitment in financial planning using structural equation modeling. Research Presentation at the Academy of Financial Services Annual Conference. Phoenix, AZ.

* Walsh, B., Heckman, S., **McCoy, M.,** & Lim, H. (September 2023). Explaining and predicting why people use personal financial management technology. Research Presentation for the Financial Planning Association. Phoenix, AZ.

[*] Machiz, I., Russell M., Johnson, P., Watkins, K., Chen, Z. White, K., & **McCoy, M.** (July 2023). Resilient personality or financial resilience framework for coping with difficulties meeting expenses and life satisfaction. Research Presentation for the Global Forum for Financial Consumers. Tokyo, Japan.

Reiter, M., **McCoy, M.**, White, K., Watkins, K., & Jurgensen, J. (May 2023). An examination of the KMSI-R: relationship to financial literacy, self-efficacy, and cross-racial validity. Research Presentation for the American Council on Consumer Interests Annual Conference. Las Vegas, NV.

[*] **McCoy, M.**, White, K., & Machiz, I. (May 2023). Impact of a resilient personality and financial resilience framework on well-being during the COVID-19 pandemic. Research Presentation for the American Council on Consumer Interests. Las Vegas, NV.

Koochel, E., Lutter, S., & **McCoy, M.** (December 2022). Protecting well-being through financial shocks. Research Presentation for the Annual Financial Planning Association Conference. Seattle, Washington.

McCoy, M., White, K., Watkins, K., & Reiter, M. (November 2022). The importance of being a “client” for financial planning students: A thematic analysis of financial planning students’ experiences meeting with a planner. Research Presentation for the Association of Financial Counseling, Planning, and Education Annual Conference. Orlando, FL.

[**] **McCoy, M.** & Kopp, D. (October 2022). How Financial Therapy Aids in Financial Planning. Research Presentation for the XY Planning Network Annual Conference. Denver, CO.

[**] **McCoy, M.** & Macksoud, C. (October 2022). Best practices for financial education in BIPOC communities. Research Presentation for the Financial Therapy Association Annual Conference. Denver, CO.

White, K., **McCoy, M.,** Watkins, K., & Reiter, M. (October 2022). Exploring the role of financial socialization on financial planning students: A thematic analysis. Research Presentation for the Financial Therapy Association Annual Conference. Denver, CO.

White, K. & **McCoy, M.** (May 2022). The majors of transgender and gender diverse college students. Research Presentation for the American Council on Consumer Interests Annual Conference. Clearwater Beach, FL.

[*] Ludwig, E., Heckman, S., & **McCoy, M.** (May 2022). A cross-racial examination of the antecedents to financial advice-seeking. Research Presentation for the American Council on Consumer Interests Annual Conference. Clearwater Beach, FL.

[**] **McCoy, M.,** Prelogar, G., Lurtz, M., & White, K. (November 2021). Best practices for working with Transgender and Gender Non-Conforming clients in your financial therapy practice. Research Presentation at the Annual Financial Therapy Association Conference. Virtual Conference.

[**] Ross, B., **McCoy, M.,** & Johnson, E. (November 2021). Writing your way into financial well-being: A Narrative Financial Therapy Experiential Writing Approach. Research Presentation at the Annual Financial Therapy Association Conference. Virtual Conference.

** **McCoy, M.,** Baker, K., Bowling, A., Brooks, M., Buland, L., Cole, T., Dineson, A., & Loker, J. (November 2021). Overcoming Financial Infidelity with Solution-Focused Therapy. Research Presentation at the Annual Financial Therapy Association Conference. Virtual Conference.

** Paredes, J., Marcus, R., & **McCoy, M**. (November 2021). Should I return the Porshe: An examination of men's midlife crisis. Poster Presentation at the Annual Financial Therapy Association Conference. Virtual Conference.

* Smodic, S., Archuleta, K., Harris, J., & **McCoy, M.** (November 2021). Evolving the estate planning process: Uncovering family values in legacy conversations. Research Presentation at the Annual Financial Therapy Association Conference. Virtual Conference.

*, ** Biever, D. F., Patel, N., Agnew, A., Kopp, D., Krausman, J., & **McCoy, M.** (November 2021). When money can't be avoided: Helping money avoidant widows using the changes and grief model. Research Presentation at the Annual Financial Therapy Association Conference. Virtual Conference.

** Tosado, L. A., Koski, J., Mortel, R., & **McCoy, M.** (November 2021). Eliciting African American and Latina/o Families' money stories: Small group conversations. Research Presentation at the Annual Financial Therapy Association Conference. Virtual Conference.

* Archuleta, K. L., Harris, J., & **McCoy, M.** (October 2021). Exploring your attitudes, values, and beliefs to better serve your clients. Research presentation given at the National Association of Personal Financial Advisors. Virtual Conference.

* Harris, J.W., Joseph, M., Machiz, I., & **McCoy, M.** (December 2020). Financial literacy, socialization, and social education: Traditional perspectives and topics. Research Presentation at the Annual Conference of the College and University Faculty Assembly. Virtual Conference.

Pearson, B., **McCoy, M.** Seay, M. & Houston, S. (December 2020). Shift happens-best practices for transitioning financial planning instructional modalities during times of crisis: A panel discussion from faculty who did it. Panel Presentation at the Center for Financial Planning's Academic Research Colloquium. Virtual Conference.

* Machiz, I., Joseph, M., Harris, J. & **McCoy, M.** (November 2020). Bridging the gap for financial educators: A systematic literature review of best practice for early elementary financial education. Research Presentation at the Annual Conference Association for Financial Counseling and Planning Education. Virtual Conference.

* **McCoy, M.,** Ross, D.B., & Ross, D. (October 2020). The evolution of a story: Updating narrative financial therapy to new CFP Board steps with experiential practice opportunities. Research Presentation at the Financial Therapy Association. Virtual Conference.

McCoy, M., Archuleta, K., & Ponciano, I. (October 2020). How being you impacts your work: a live demonstration of person of the therapist genogram exploration. Research Presentation at the Annual Financial Therapy Association Conference. Virtual Conference.

[**] Sterbenz, E., **McCoy, M.,** Melton, R., Ross, D., & Smith, J. (October 2020). Using scaffolding learning theory as a framework to enhance financial education with financial planning clients. Research Presentation at the Annual Financial Therapy Association Conference. Virtual Conference.

[**] Astle, N., Kirsten, C., Rodriguez, G., & **McCoy, M.** (October 2020). Using emotion in financial therapy: Application of Emotionally Focused Therapy to Financial Therapy. Research Presentation at the Annual Financial Therapy Association Conference. Virtual Conference.

[*] Gray, B., Asebedo, S., Lawson. D.R., Lurtz, M.R., **McCoy, M.**, Pickens, J.C., Durband, D.B., Fife, S.T., Sheridan, J., Archuleta, K.L., & Ford, M.R. (September 2020). Facilitating virtual client meetings for money conversations: Skills, strategies, and outcomes. Research Presentation at the Annual Financial Planning Association Conference. Virtual Conference.

[*] Walsh, B., Sensenig, D., Machiz, I., Russell, M., Stanley, N., & **McCoy, M.** (September 2020). Utilizing what we know about tele-mental health in tele-financial planning: A systemic literature review. Research Presentation at the Annual Financial Planning Association Conference academic track. Virtual Conference.

[**] Smodic, S., Rauschenberger, J., Watts, E., & **McCoy, M.** (May 2019). Financial planning with ambiguous loss from Alzheimer's Disease: Implications, application and interventions. Research Presentation at the Financial Therapy Association Annual Conference. Austin, TX.

[*] Moore, C. & **McCoy, M.** (May 2019). Financial planner's experience in financial therapy. Research Presentation at the Financial Therapy Association Annual Conference. Austin, TX.

[**] Tennereli, D., Weaver, S., **McCoy, M.,** & Astle, N. (May 2019). Scaffolding versus enabling: Financially supporting adult children. Research Presentation at the Financial Therapy Association Annual Conference. Austin, TX.

[**] Strong, C.R., Hattrup, L., Glenn, B., & **McCoy, M.** (May 2019). Financial therapy engagement: Collaborations and referrals for financial planners. Research Presentation at the Financial Therapy Association Annual Conference. Austin, TX.

[**] Stephens, R., Pickard, S., **McCoy, M.,** & Harris, J. (May 2019). Forging a common strategy between business partners with differing money scripts. Research Presentation at the Financial Therapy Association Annual Conference. Austin, TX.

[**] Boyd, K., Knox, N., Bately, G., & **McCoy, M.** (May 2019). Fiduciary considerations of using the Certified Financial Therapist™ designation. Research Presentation at the Financial Therapy Association Annual Conference. Austin, TX.

[*, **] **McCoy, M.,** White, K.J., Chen, X., & Astle, N. (May 2019). Exploring the impact of marital status on financial conversations. Poster Presentation at the Financial Therapy Association Annual Conference. Austin, TX.

[*] Harris, J. & **McCoy, M.** (May 2019). Bridging the gap in financial therapy. Research Presentation at the Financial Therapy Association Annual Conference. Austin, TX.

Muruthi, B., Watkins, K., **McCoy**, **M**., & Muruthi, J. R. (November 2019). Transnationalism and family resource allocation for East African immigrant women. Research Presentation at the Association for Financial Counseling and Planning Education Annual Conference. Portland, OR.

Park, N., Thomas, M., White, K., Watkins, K., & **McCoy, M.** (February 2019). The relationship between financial knowledge, financial management, and financial self-efficacy among African American students. Poster Presentation at the Center for Financial Planning's Academic Research Colloquium. Arlington, VA.

White, K., **McCoy, M.,** & Kwak, E.J. (February 2019). Does race impact our money conversations? Poster session presented at FERMA Risk Management Forum. Virtual Conference.

McCoy, M., Farnham, A., Muruthi, B., & Bermudez, M. (October 2017). Deconstructing older adult sexual intimacy sexual scripts. Research Presentation at the American Association for Marriage and Family Therapy Annual Conference. Atlanta, GA.

Muruthi, B., Watkins, K., **McCoy, M.**, Muruthi, J.R., & Kiprono, F.J. (November 2016). Transnationalism and family resource allocation for east African immigrant women. Research Presentation at the Association for Financial Counseling, Planning, and Education Conference. Louisville, KY.

Jetson, D. & **McCoy, M.** (September 2013). Distance counseling in Financial Therapy. Research Presentation at the Financial Therapy Association Conference. Orlando, FL.

Asebedo, S. D., **McCoy, M.,** & Archuleta (September 2013). 2013 membership profile of the Financial Therapy Association. A strategic planning report. Survey results were presented at the Financial Therapy Association Conference. Orlando, FL.

Gale, J., Goetz, J., Ross, B., DeGraff, A., & **McCoy, M.** (September 2013). Drafting professional standards for financial therapists: An invitation to join the conversation. Research Presentation at the Financial Therapy Association Conference. Lubbock, TX.

McCoy, M. & Ross, B. (February 2013). A case illustration of sensate focus therapy with a polyamorous couple. Research Presentation at the International Family Therapy Association Conference. Orlando, FL.

McCoy, M. & Ross, B. (February 2013). Alleviating the strain on your relationship while alleviating your wallet: Helping couples with financial strain through a narrative lens. Research Presentation at the International Family Therapy Association Conference. Orlando, FL.

McCoy, M., Gale, J., Ford, M. & McCoy, R. (September 2012). A therapist's perspective of a financial planning course: Implications for financial therapy. Poster Presentation at the Financial Therapy Association Conference. Columbia, MO.

Ford, M., Goetz., J., & **McCoy, M.** (September 2012). Financial trauma: Utilizing EMDR therapy for healing. Research Presentation at the Financial Therapy Association Conference. Columbia, MO.

McCoy, M., Abrams, B., Ford, M., & Bermudez, J. M. (September 2012). Co-constructing preferred money scripts through a contextual lens. Research Presentation at the Financial Therapy Association Conference. Columbia, MO.

Ford, M., Baptist, J.A., Archuleta, K.L., & **McCoy, M.** (September 2012). A live demonstration of the Ford Financial Empowerment Model. Research Presentation at the Financial Therapy Association Conference. Columbia, MO.

Stinson, M., Bermudez, J.M., **McCoy, M.**, & Abrams, B.A. (September 2012). Intersectionality of Latinos, marital satisfaction, religiosity and conflict resolution. Poster Presentation at the American Association of Marriage and Family Therapy Conference. Charlotte, NC.

Abrams, B., Rush, K., **McCoy, M.,** & Stinson, M. (September 2012). Afro-Caribbean single women parenting in the U.S. Poster Presentation at the American Association of Marriage and Family Therapy Conference. Charlotte, NC.

McCoy, M. & Hjelmstad, L. (March 2012). Utilizing Skype in couple's therapy. Poster Presentation at the International Family Therapy Association. Vancouver, Canada.

McCoy, M. & Gale, J. (March 2012). Attending to couples, money, food, and the home: The creation of an interdisciplinary clinic. Poster Presentation at the International Family Therapy Association. Vancouver, Canada.

McCoy, M & Hjelmstad, L. (September 2011). Exploring the issue of timing in relational financial therapy. Research Presentation at the Financial Therapy Association Conference. Athens, GA.

Hjelmstad, L., **McCoy, M,** & Wyczalkowski, C. (September 2011). Mechanisms of successful collaboration between Financial Planners and Marriage and Family Therapists. Roundtable Presentation at the Financial Therapy Association Conference. Athens, GA.

Invited Presentations

McCoy, M. & Bloom, I. (February 2024). Integrating life planning into financial planning. Financial Planning Association of Michigan Student Success Summit. Virtual Conference.

Khrais, R. & **McCoy, M.** (February 2024). Moving through the discomfort: Financial wellness at work. Minnesota Non-Profit Conference. Virtual Conference.

Horan, S., **McCoy, M.,** Bajtelsmit, V., & Ciccotello, C. (May 2023). Panel representation of *Financial Planning Review* on financial planning academic journals panel. Academy of Financial Services Annual Conference. Phoenix, AZ.

** **McCoy, M.** & Koski, J. (August 2023). Fostering trust in your client relationships: A Newbie's Guide. FPA NextGen. Denver, CO.

McCoy, M. (June 2023). The art of relationship building in financial planning: Essential tools and techniques for long-lasting connections. Kansas State University. Olathe, KS.

McCoy, M. (April 2023). Understanding the antecedents to trust and commit in planner-client relationships. Personal Financial Professionals Summit. Kansas State University.

McCoy, M., Watkins, K., White, K. (April 2023). Exploring the racial wealth gap. Panel for Vanderbilt University's Financial Well-being Seminar. Virtual Seminar.

McCoy, M., Bloom, I., & Frank, D. (February 2023). Integrating life planning into financial planning. Financial Planning Association of Michigan Student Success Summit. Virtual Conference.

Horan, S., Geczy, C., Robinson, T., Ciccotello, C., & **McCoy, M.** (October 2022). Panel with the *Financial Planning Review Editors*. Presentation at the Center for Financial Planning's Academic Research Colloquium. Washington, DC.

McCoy, M. (February 2022). How financial therapy can help financial planning students. Financial Planning Association of Michigan Student Success Summit. Virtual Conference.

McCoy, M. (October 2020). How financial therapy can add value when assisting your financial planning clients. Financial Planning Association Michigan Annual Conference. Virtual Conference.

McCoy, M. (October 2020). Conflict resolution in your financial planning practice. Financial Planning Association NextGen SoCal Summit. Virtual Conference.

Webinars

[*] **McCoy, M.,** Moore, H., & Staples, T. (April 2024). Focus groups on the return to the financial planning profession after motherhood. Webinar Presentation for the Women's Leadership Alliance.

McCoy, M. (January 2024). Fostering trust in your client relationships. Webinar Presentation for the Financial Expert Network.

McCoy, M. (February 2022). Financial well-being. Webinar Presentation for Kansas Child Care Training Opportunities.

McCoy, M. (February 2022). How financial therapy can aid in your financial planning practice. Webinar Presentation for NAPFA West Region Symposium,.

McCoy, M. (September 2022). Conflict resolution in financial planning. Webinar Presentation for the Financial Expert Network.

McCoy, M., Koochel, E., & Lurtz M. (September 2022). Webinar Series on Financial Therapy for eMoney.

McCoy, M. (December 2021). Understanding financial anxiety in financial planning clients. Webinar Presentation for Next Gen Personal Finance Speaker Series.

McCoy, M. (June 2021). Insights into your client's money mindset. Webinar Presentation for Kansas State Olathe.

[**] Tennereli, D., Wever, S., & **McCoy, M.** (March 2021). Scaffolding versus enabling: Financially supporting adult children. Webinar Presentation for the Financial Therapy Association.

McCoy, M. (April 2021). How financial therapy can add value when assisting your mental health clients. Webinar Presentation for the Los Angeles Chapter of California Association of Marriage and Family Therapists.

[*] **McCoy, M.** & Harris, J. (October 2020). Exploring financial anxiety in financial planning. Webinar Presentation for the XY Planning Network.

McCoy, M. & Lurtz, M. (October 2020). Advice for financial planners in light of COVID-19. Webinar Presentation for the Million Dollar Round Table.

McCoy, M. (October 2020). How financial therapy can aid in your financial planning practice. Webinar Presentation for the Money Quotient Research & Education Series.

McCoy, M. (February 2020). How Financial Therapy can aid in your financial planning practice. Webinar Presentation for the Purposeful Planning Institute.

[*,**] Stephens, R., Pickard, S., Harris, J., Kahler, R., & **McCoy, M.** (September 2019). House-work: When you're client experiences conflict in a family business. Webinar Presentation for the Financial Therapy Association.

[**] Smodic, S., Forst, E., & **McCoy, M.** (August 2019). Journal in the round: Alzheimer's and dementia. Webinar Presentation for the Financial Planning Association.

[**] **McCoy, M.** & Astle, N. (June 2019). Difficult conversations part III: Financial infidelity. Webinar presentation for the Financial Planning Association and the Financial Therapy Association.

[**] **McCoy, M.** & Smodic, S. (April 2019). Difficult conversations part I: Alzheimer's and dementia. Webinar Presentation for the Financial Planning Association and the Financial Therapy Association.

[**] **McCoy, M.,** Lurtz, M., & Coambs, E. (March 2019). Exploring how financial therapy can aid your mental health practice. Webinar Presentation for the Financial Therapy Association.

McCoy, M., Lurtz, M., & Cherry, P. (February 2019). Exploring how financial therapy can aid your financial planning practice. Webinar Presentation for the Financial Therapy Association.

Invited Presentations for Outside Universities

McCoy, M. (March 2023). Conflict resolution in financial planning. Presentation for New York University. MSFP1-FC 2010 001: Money and Relationships. Emily Koochel.

McCoy, M. (February 2023). Financial therapy and client psychology. Presentation for Texas Tech University. PFP 5377: Psychology of Financial Planning. Sonya Lutter.

McCoy, M. (November 2022). Couple communication around money. Presentation for University of Georgia. HFCE 7200: Advanced Client Communication and Counseling . Kimberly Wakins.

McCoy, M. (April 2022). Narrative Financial Therapy. Presentation for the University of Georgia. FHCE 8500: Survey of Financial Therapy. Kristy Archuleta

McCoy, M. (February 2021). Introducing financial therapy to financial planning students. Presentation for the University of Georgia. FCHE 8200: Financial Planning and Analysis. Kenneth White.

Invited Presentations for Kansas State University

McCoy, M. (April 2024). The impact of financial stress on emotional well-being. Guest Lecture Veterinarian Medicine. Kansas State University. VCS 880 - Veterinary Practice Management. Kate Drew and Elizabeth Davis.

McCoy, M. (February 2024). Love and money: Merging your finances and love life together. PowerCat Financial. Kansas State University.

McCoy, M. (September 2023). How to find financial well-being. Guest Lecture Veterinarian Medicine. Kansas State University. VCS - 891 M - Topics in Rural Business Practice Skills. James Roush.

McCoy, M. (February 2023). Love and money: Merging your finances and love life together. PowerCat Financial. Kansas State University.

McCoy, M. (February 2022). Love and money: Merging your finances and love life together. PowerCat Financial. Kansas State University.

McCoy, M. (April 2021). Emotions and Money. Wallet Wisdom. Kansas State University Research and Extension.

Research Experience

2010-2013 Family and Community Resilience Laboratory
University of Georgia, Athens, GA

- Developed and created survey instruments
- Collected data from six Army garrisons from March 2012 - January 2013
- Imported, cleaned, and analyzed survey data from 1,036 military youth

2004-2006 Department of Social Psychology
University of North Carolina, Chapel Hill, NC

- Developed observational coding paradigms for interviews
- Conducted interviews with couple's regarding their relational satisfaction
- Completed coding for interviews

2004-2005 Department of Psychometrics
University of North Carolina, Chapel Hill, NC

- Office work and data entry
- Participant recruitment and enrollment

Teaching Experience

Spring 2022 - Present: Kansas State University, Manhattan, KS

- PFP 825: Survey of Personal Financial Planning Research and Theory
- PFP 769: Money and Relationships
- PFP 315: Love and Money
- HHS 203: Financial Well-Being
- HHS 300: Money and Meaning
- PFP 808: Research Application in Personal Financial Planning

Fall 2019 - Fall 2021: Kansas State University, Manhattan, KS

- PFP 888: Research Methods
- PFP 825: Survey of Personal Financial Planning Research and Theory
- PFP 771: Research in Financial Therapy
- PFP 769: Money and Relationships
- PFP 768: Introduction to Financial Therapy
- PFP 315: Love and Money
- PFP 105: Introduction to Personal Financial Planning (a First - Year Experience)
- HHS 203: Financial Well-Being
- HHS 300: Money and Meaning
- PFP 808: Research Application in Personal Financial Planning

Fall 2017 - Spring 2019: Northcentral University (National University), San Diego, CA

- MFT 5101: Foundations for Graduate Study in MFT
- MFT 5102: Legal, Ethical, and Professional Development
- MFT 5104: Treatment Planning and Traditional MFT
- MFT 5105: Recovery-Oriented Care & Postmodern Therapy
- MFT 6101: Human Development and Family Dynamics
- DMFT 8701: Financial Administration and Budgeting in MFT

Graduate Student Advising

Major Professor:

Joshua Harris	Ph.D., Personal Financial Planning	2023
Shelitha Smodic	Ph.D., Personal Financial Planning	Expected 2024
Christopher Moore	Ph.D., Personal Financial Planning	Expected 2025
Joanne Wu	Ph.D., Personal Financial Planning	Expected 2026

Co-Major Professor:

Tanya Staples	Ph.D., Personal Financial Planning	Expected 2026

Committee Member:

Shane Enate	Ph.D., Personal Financial Planning	2021
Derek Sensenig	Ph.D., Personal Financial Planning	2022
Brian Walsh	Ph.D., Personal Financial Planning	2023
Ives Machiz	Ph.D., Personal Financial Planning	2023
Jodi Krausman	Ph.D., Personal Financial Planning	2024
Brandan Ratzlaff	Ph.D., Personal Financial Planning	Expected 2024
Ashlyn Rollins-Koons	Ph.D., Personal Financial Planning	Expected 2024
Lena Gan	Ph.D., Personal Financial Planning	Expected 2024
Jason Anderson	Ph.D., Personal Financial Planning	Expected 2024

Outside Committee Member:

Shreeya Jugnandan	Ph.D., University of Cape Town, PFP	2024
Stephen Molchan	Ph.D., Texas Tech, HDFS	Expected 2024
Laurie Baker	Ph.D., Kansas State University, Education	Expected 2024

Undergraduate Student Research

Sarah Biehler — Annual Survey on Practitioner Pain Points
Kansas State University, Manhattan, KS
Spring 2024

Favian Liniger — Book Chapter on Emerging Adults
Kansas State University, Manhattan, KS
Fall 2023 – Spring 2024

Ruth McCaleb — Systematic Review of the Journal of Financial Planning
Kansas State University, Manhattan, KS
Spring 2022

Jordan Priddy — Systematic Review on Family Financial Socialization Theory
Kansas State University, Manhattan, KS
Fall 2021

Editorial Service

2023 - present — Editorial Board for *Contemporary Family Therapy, Financial Services Review,* and *Financial Planning Research Journal*

2022 - present — Co-Editor for *Financial Planning Review*

2022 - present — Editorial Board *Journal of Financial Planning* and *Journal of Financial Therapy*

2020 - 2020 Special Issue Guest Editor *Journal of Contemporary Family Therapy*

2019 - 2022 Associate Editor of Profiles and Book Reviews, *Journal of Financial Therapy*

2019 - present Reviewer for *American College Health, Child & Family Social Work, Family Transitions, International Journal of Environmental Research and Public Health, Journal of Consumer Affairs, Journal of Couple and Relationship Therapy, Journal of Family and Economic Issues, Journal of Family Psychology, Journal of Financial Counseling and Planning,* and *Journal of Sex & Marital Therapy*

Professional Service

Professional Organization Board Service

2024 - Present Member, Forbes Advisor Advisory Board
2023 - Present Member, Financial Therapy Clinical Institute Board of Directors
2023 - Present University Partnership Chair, Financial Therapy Association
2022 - Present Webinar Chair, Financial Therapy Association
2019 - 2022 Secretary, Financial Therapy Association Board of Directors
2014 - Present Member, Financial Therapy Association Board of Directors
2013 - 2014 Student Member, Financial Therapy Association Board of Directors

Professional Organization Conference Reviewer

2023 Academy of Financial Services
2023 National Council on Family Relations
2019 - Present Financial Therapy Association

University Level Service

2024 - Present Faculty Senate, Kansas State University
2024 - Present Faculty Senate Academic Affairs, Kansas State University
2024 Powercat Executive Director Search Committee, Kansas State University

College Level Service at Kansas State University

2023 Interim Associate Dean of Research Search Committee
Kansas State University, College of Health and Human Sciences

2023 – Present Subcommittee on Microcredentialing
Kansas State University, College of Health and Human Sciences

2023 - 2024 Past Chair Course and Curriculum Committee
Kansas State University, College of Health and Human Sciences

2022 - 2023	Chair Course and Curriculum Committee Kansas State University, College of Health and Human Sciences
2020 - Present	Course and Curriculum Committee Kansas State University, College of Health and Human Sciences

Department Level Service

2023	Academic Advisor Search Committee Kansas State University, Department of Personal Financial Planning
2023	Professor of Practice Search Committee Kansas State University, Department of Personal Financial Planning
2022 - Present	Master Program Committee Kansas State University, Department of Personal Financial Planning
2022 - Present	Comprehensive Exam Committee Kansas State University, Department of Personal Financial Planning
2019 - 2022	Director of the Master's Program Kansas State University, Department of Personal Financial Planning

Awards

2024	Best Researcher Award Financial Therapy Association
2023	Jay Mancini Faculty Award Winner, Kansas State University Kansas State University Foundation
2023	*Journal of Financial Planning's* "Best of 2023" Issue *Journal of Financial Planning* Paper Title: The influence of risk, financial literacy, and trust on financial advice-seeking behavior in a cross-racial examination.
2023	Best Student Research Paper Award International Academy of Financial Consumers Paper Title: Resilient Personality or financial resilience framework for coping with difficulties meeting expenses and life satisfaction

2023 Academic Research Colloquium Best Research Paper Award
Center for Financial Planning
Paper Title: Exploring the relationships between virtual client meetings, financial anxiety, and trust in financial planning.

2023 Early Career Researcher Award
Academy of Financial Services

2023 Ann Coulson Graduate Faculty Teaching Award
Kansas State University, Department of Personal Financial Planning

2023 Outstanding Graduate Faculty Member Award
Kansas State University, Graduate School

2022 Best Paper Award
National Council on Family Relations

2022 Jay Mancini Faculty Award Winner
Kansas State University Foundation

2021 Best Instructor Award
Financial Therapy Association

2021 Best Paper Award
Financial Therapy Association

2021 Professor of the Week
Kansas State University

2021 Myers-Alford Teaching Award
Kansas State University, Health and Human Sciences

2019 Best Paper Award
Financial Therapy Association

2014 Student Travel Scholarship
Financial Therapy Association

2013 Anne and Earl Haltiwanger Scholarship
University of Georgia, Human Development and Family Science

Media Appearances

Podcasts

Date	Source	Hyperlink
April 20, 2024	Today Online	https://www.todayonline.com/world/dont-make-these-mistakes-when-discussing-money-couple-2404806
April 19, 2024	Apple News In Conversation	https://podcasts.apple.com/us/podcast/how-money-affects-your-mental-health/id1577591053?i=1000652870007
November 19, 2023	Art of Allowance	https://themoneymammals.com/aoa-065-how-can-parents-get-on-the-same-page-financially-with-guest-megan-mccoy/
August 20, 2023	Bridging the Gap	https://www.youtube.com/watch?v=NfSuZN-rZBg
August 1, 2023	Divorce for Wealthy Women	https://open.spotify.com/episode/3kLSY0cW0tkgwHA5JG0LNb
May 28, 2023	Motivate Your Money!	https://www.youtube.com/watch?v=_JpERvSEva0
May 9, 2023	LifeBlood	https://lnns.co/zgyxkbMaZ-1
April 20, 2023	Margaritas with Margeurita	https://www.youtube.com/watch?v=zeNrfN4dcX0
November 20, 2023	Money Mammals	https://themoneymammals.com/aoa-065-how-can-parents-get-on-the-same-page-financially-with-guest-megan-mccoy/
April 3, 2023	Framework with Jamie Hopkins and Ana Trujillo Limon	https://podnews.net/podcast/i4srz/episodes
March 15, 2023	Capital Club	https://lnns.co/dwGVCX1uMvn
December 3, 2022	Motley Fool	https://www.fool.com/investing/2022/12/03/what-best-buy-is-getting-right/
November 25, 2022	Modern Husband	https://www.buzzsprout.com/2000968/11767504-how-to-talk-about-and-manage-money-with-your-spouse-dr-megan-mccoy
November 17, 2022	Shift with Ross Marino	https://www.youtube.com/watch?v=XWAF8RpSrRI&list=PLCaoidFkYvvXgrErkelOwun5aO0kIr4FH&index=46
October 26, 2022	Banking on Digital Growth	https://www.digitalgrowth.com/podcast/banks-credit-unions-fintech-financial-therapy
September 2, 2022	Philanthropy Today	https://www.buzzsprout.com/1630930/11250722-megan-mccoy-philanthropy-today-episode-80

June 15, 2022	XY South Africa	https://fpsa.podbean.com/e/50-megan-mccoy/
June 3, 2022	Keen Wealth Advisors	https://keenwealthadvisors.com/insights/developing-a-healthy-relationship-with-money
May 15, 2022	Long Story $hort	https://podcasters.spotify.com/pod/show/long-story-short-mmi/episodes/How-emotional-well-being-is-tied-to-financial-health-e1jat1n
October 8, 2021	AAMFT Podcast	https://www.youtube.com/watch?v=V1mRofDnK1U
October 7, 2021	The Most Hated F Word	https://themosthatedfword.com/episode-60-how-to-use-psychology-to-create-your-money-story/
July 1, 2021	Getting Better with Dr. Adam	https://gettingbetterwithdradam.libsyn.com/episode-13-money-matters-megan-mccoy-phd
May 12, 2021	The Amicable Divorce	https://judyweigle.podbean.com/e/are-you-committing-financial-infidelity-with-drs-megan-mccoy-and-alex-melkumian/
March 26, 2021	The Money Tree	https://www.everand.com/podcast/500392656/Megan-McCoy-For-more-information-visit-the-show-notes-at-Today-s-Panelists-Kirk-Chisholm-Barbara-Friedberg-Megan-Gorman
March 17, 2021	Money Savage Life-Blood Podcast	https://moneysavage.podbean.com/e/financial-therapy-with-megan-mccoy/
February 7, 2021	Hack Your Wealth	https://hackyourwealth.com/money-marriage
January 20, 2021	A Smart Financial Plan	https://www.mywealthplanners.com/podcast/a-smart-financial-plan-ep-2-dr-megan-mccoy-dr-kenneth-white/
September 10, 2019	Dandelions: A podcast for women	[https://www.podfriend.com

TV/Radio

Date	Source	Hyperlink
July 24, 2024	CNBC	https://www-cnbc-com.cdn.ampproject.org/c/s/www.cnbc.com/amp/2024/07/24/how-to-emotionproof-your-portfolio-ahead-of-the-presidential-election.html
May 23, 2024	New York Magazine - The Cut	https://www.thecut.com/article/doom-spending-how-to-stop.html
March 22, 2024	NPR Marketplace	https://www.marketplace.org/2024/03/22/this-is-some-free-financial-therapy/
July 25, 2023	NPR Air talk with Larry Mantle	https://www.npr.org/podcasts/381444294/air-talk
March 27, 2023	NPR Marketplace	https://www.marketplace.org/2023/03/27/bank-regulators-capitol-hill-calm-markets-public/
June 1, 2023	KSNT Topeka Local News	https://www.ksnt.com/news/local-news/k-state-therapist-speaks-on-importance-of-talking-about-money/
May 8, 2023	CBS News Money Watch	https://www.cbsnews.com/texas/news/money-affects-mental-health-bankrate-survey/?intcid=CNM-00-10abd1h
April 21, 2023	Scripps News	https://www.youtube.com/watch?v=Wx-VOWsqsVI https://www.youtube.com/watch?v=vd8hwPfF1Gk https://www.youtube.com/watch?v=L4EaW_Lte0k
August 25, 2022	NBC News Now	https://x.com/i/status/1562787095894077454
July 8, 2022	Radio, NPR Million Bazillion	https://www.marketplace.org/shows/million-bazillion/why-is-money-so-awkward/
March 7, 2022	The Today Show	https://www.today.com/video/stephanie-ruhle-and-financial-experts-give-helpful-tips-on-talking-to-your-loved-ones-about-money-134807109620
February 26, 2021	KSNT Topeka Local News	https://www.ksnt.com/news/health-check/love-and-money-expert-says-discussing-finances-with-partner-strengthens-relationship-overall-wellbeing/
June 2, 2020	ATLFM News	https://atlfmnews.com/teach-children-financial-literacy-to-improve-financial-socialization-prof-megan-mccoy/
April 9, 2020	NPR Marketplace podcast	https://www.marketplace.org/shows/this-is-uncomfortable-reema-khrais/zoom-therapy-in-a-pandemic/
February 11, 2020	NPR	https://www.wfyi.org/programs/all-in/radio/What-is-Financial-Infidelity
February 3, 2020	NBC News	https://www.nbcnews.com/better/lifestyle/does-stress-have-negative-impact-your-financial-decisions-you-re-ncna112895

Newspaper/Magazine

Date	Source	Hyperlink
August 9, 2024	Market Watch	https://www.marketwatch.com/guides/banking/joint-banking-study/
July 21, 2024	Wall Street Journal	https://www.wsj.com/articles/your-credit-card-has-a-spending-limit-should-your-marriage-8ffc010
June 20, 2024	New York Magazine	https://www.thecut.com/article/save-money-travel.html
May 28, 2024	Wall Street Journal	https://www.wsj.com/buyside/personal-finance/financial-tips/how-to-prepare-for-a-recession
May 8, 2024	TIME Magazine	https://time.com/6975969/how-financial-therapists-work/
May 13, 2024	Forbes	https://www.forbes.com/advisor/banking/savings/best-high-yield-savings-accounts/
May 13, 2024	Forbes	https://www.forbes.com/advisor/banking/cds/best-cd-rates/
May 10, 2024	TIME	https://time.com/6975969/how-financial-therapists-work/
May 3, 2024	Forbes	https://www.forbes.com/advisor/banking/checking/best-joint-checking-accounts/
April 5, 2024	The New York Times	https://www.nytimes.com/2024/04/05/well/family/money-relationships.html
March 29, 2024	Fortune	https://fortune.com/well/article/marriage-talk-about-money-tips/
March 14, 2024	Atchison Globe	https://www.atchisonglobenow.com/news/national/stressed-about-money-how-to-keep-your-kids-from-worrying-too/article_3355fb09-e80a-5079-b965-b0d490ce98de.html?=/
March 11, 2024	The Seattle Times	https://www.seattletimes.com/business/kimberly-palmer-worried-about-money-ways-to-keep-your-kids-from-feeling-your-stress/
February 25, 2024	TIME	https://time.com/6802061/scammers-financial-fraud-emotions/
February 5, 2024	MarketWatch	https://www.marketwatch.com/guides/banking/joint-banking-study/
January 16, 2024	The Wall Street Journal	https://www.wsj.com/buyside/personal-finance/how-to-prepare-for-a-recession-e6fb00c
October 5, 2023	New York Magazine - The Cut	https://www.thecut.com/article/my-boyfriends-dad-bought-us-a-house-what-do-i-tell-friends.html

July 25, 2023	The New York Times	https://www.nytimes.com/2022/07/25/well/mind/stress-money-relationships.html
July 21, 2023	The Wall Street Journal	https://www.wsj.com/articles/your-credit-card-has-a-spending-limit-should-your-marriage-8ffc010
July 6, 2023	New York Magazine - The Cut	https://www.thecut.com/article/save-money-summer-travel.html
May 24, 2023	Investment News	https://www.investmentnews.com/industry-news/fea-tures/ow-not-wow-drives-client-change-234847
April 27, 2023	New York Magazine - The Cut	https://www.thecut.com/article/personal-injury-settle-ment.html
April 20, 2023	Inkandescent Women	https://inkandescentwomen.com/the-women/megan-mccoy/
March 31, 2023	The New York Times	https://www.nytimes.com/2023/03/31/well/tax-day-money-stress-anxiety.html
March 29, 2023	Business Insider	https://www.businessinsider.com/personal-finance/cash-envelope-method-trending-tiktok-2021-12
March 3, 2023	The New York Times	https://www.nytimes.com/2023/03/03/business/shop-ping-spending-retirement.html
March 2, 2023	New York Magazine - The Cut	https://www.thecut.com/article/i-inherited-millions-from-my-mother-and-everyone-knows.html
January 10, 2023	Rethinking65	https://rethinking65.com/2023/02/07/being-sympathetic-with-clients-can-lead-to-bad-outcomes/
December 18, 2022	Salina Post	https://salinapost.com/posts/25d4172e-0be9-469b-9854-2419f6545282
November 2, 2022	Everyday Health	https://www.everydayhealth.com/emotional-health/wor-ried-about-money-this-holiday-season-heres-what-finan-cial-psychologists-want-you-to-know/
November 1, 2022	Boston Globe	https://www.bostonglobe.com/2022/11/01/business/five-ways-improve-your-relationship-with-money-according-financial-therapists/
October 6, 2022	New York Magazine - The Cut	https://www.thecut.com/article/new-parent-finances-mess.html
August 13, 2022	The New York Times	https://www.nytimes.com/2022/08/13/business/finan-cial-therapy-personal-finance.html
July 22, 2022	Fatherly	https://www.fatherly.com/life/financial-anxiety-strate-gies
May 6, 2022	Washington Post	https://www.washingtonpost.com/dc-md-va/2022/05/05/your-money-trouble-could-be-rooted-trauma/

February 26, 2022	Business Insider	https://www.businessinsider.com/personal-finance/financially-stable-married-relationships-financial-therapist-2022-2
February 17, 2022	Business Insider	https://www.businessinsider.com/personal-finance/money-behaviors-first-date-2022-2
February 14, 2022	Business Insider	https://www.businessinsider.com/personal-finance/healthy-money-conversations-valentines-day-2022-2
February 9, 2022	CNBC	https://www.cnbc.com/2020/03/16/how-to-cope-with-coronavirus-related-financial-stress-and-anxiety.html
January 22, 2022	Business Insider	https://www.businessinsider.com/personal-finance/small-money-lies-financial-infidelity-2022-1
January 15, 2022	Business Insider	https://www.businessinsider.com/personal-finance/signs-financial-abuse-experts-2022-1
December 18, 2021	Business Insider	https://www.businessinsider.com/personal-finance/money-mistakes-not-that-bad-2021-12
December 16, 2021	The Cut, New York Magazine	https://www.thecut.com/2021/09/my-husband-wont-pay-for-child-care.html
December 15, 2021	Business Insider	https://www.businessinsider.com/personal-finance/common-money-mistakes-worse-than-you-think-2021-12
December 2, 2021	New York Magazine - The Cut	https://www.thecut.com/2021/12/my-dad-judges-my-husband-for-not-making-more-money.html
September 10, 2021	The Wall Street Journal	https://www.wsj.com/articles/how-to-prepare-for-taking-a-career-break-11631271607?st=x0p3k2z1lmqaclr&reflink=article_copyURL_share
June 10, 2021	Money	https://money.com/obsessed-with-personal-finance/
June 10, 2021	The Cut, New York Magazine	https://www.thecut.com/2021/06/i-dont-drink-but-my-friends-still-want-to-split-the-bill.html
May 26, 2021	Atchison Globe	https://www.atchisonglobenow.com/voices/tips-to-cope-with-covid-19-financial-stress/article_8430fa12-be6a-11eb-a485-6b55fb0af651.html
May 11, 2021	Nola.com	https://www.nola.com/entertainment_life/mental_health_matters/article_8f144974-aeb2-11eb-ab31-1ff92da8a779.html
May 7, 2021	InStyle	https://www.instyle.com/lifestyle/revenge-shopping
February 12, 2021	Investor’s Business Daily	https://www.investors.com/financial-advisors/financial-planning-professors-teach-next-generation-advisors-to-attain-success/

December 31, 2020	New York Magazine - The Cut	https://www.thecut.com/2020/12/money-lessons-from-a-truly-terrible-year.html
November 23, 2020	Yahoo News	https://www.yahoo.com/news/kimberly-palmer-worried-money-ways-160952907.html?fr=sycsrp_catchall
November 21, 2020	The Wall Street Journal	https://www.wsj.com/articles/love-and-moneyand-how-theyre-connected-11605917843
November 9, 2020	Motley Fool	https://www.fool.com/investing/2020/11/09/is-financial-therapy-for-you/
September 17, 2020	The New York Times	https://www.nytimes.com/2020/09/17/fashion/wed-dings/how-covid-has-altered-the-conversation-about-money.html
September 12, 2020	The Wall Street Journal	https://www.wsj.com/articles/how-covid-19-derailed-my-financial-goals-11599922800
April 23, 2020	The Wall Street Journal	https://www.wsj.com/articles/if-you-must-go-into-debt-heres-what-to-consider-11587634201
March 16, 2020	CNBC	https://www.cnbc.com/2020/03/16/how-to-cope-with-coronavirus-related-financial-stress-and-anxiety.html
March 3, 2020	CNN Business	https://www.cnn.com/2020/03/03/success/money-mar-riage/index.html
February 27, 2020	New York Magazine - The Cut	https://www.thecut.com/2020/02/how-can-i-get-my-hus-band-off-my-back-about-money.html
December 29, 2019	The Wall Street Journal	https://www.wsj.com/articles/new-budget-no-budget-maybe-you-need-a-bit-of-both-11577620801
November 30, 2019	The Wall Street Journal	https://www.wsj.com/articles/for-boomers-and-their-children-money-conversations-can-be-tough-11575118801
August 15, 2019	CNBC	https://www.cnbc.com/2019/08/15/what-is-financial-therapy.html
May 9, 2019	BBC Mundo	https://www.bbc.com/mundo/noticias-48178077
April 24, 2019	Real Simple	https://static1.squarespace.com/static/5d229f06a9a620000184be54/t/5d27bfb87a0c2a000168cb91/1562886073728/100-106+RSP0519+FAM.pdf
April 9, 2019	USA Today	https://www.usatoday.com/story/money/column-ist/2019/04/09/financial-planning-do-you-need-therapy-money-stress-struggles/3284181002/

Other Media

Date	Source	Hyperlink
April 24, 2024	Transition to Money Toolkit	https://moneymarriageu.thinkific.com/courses/transition-to-marriage-toolkit-dr-mccoy
March 1, 2024	Financial Therapy Masters Series	https://ftcitraining.thinkific.com/courses/financial-therapy-master-series
August 2, 2020	Knowable	https://knowable.fyi/courses/money-mindset
June 30, 2022	eMoney Blog	https://emoneyadvisor.com/blog/using-financial-psychology-for-lgbtq-inclusivity-in-your-practice/
December 10, 2021	Fidelity	https://www.fidelity.ca/en/insights/articles/5-expert-strategies-to-help-manage-financial-anxiety/
October 13, 2021	Buzzfeed	https://www.buzzfeed.com/jackielam/why-couples-fight-about-money
May 15, 2020	Morningstar	https://www.morningstar.com/funds/how-handle-emotional-money-discussions
December 20, 2022	Morningstar	https://www.morningstar.com/financial-advice/how-avoid-arguing-over-money