Ajamu C. Loving

Education

Texas Tech University Lubbock, Texas 2010

- **Ph.D.** in **Personal Financial Planning**
- 18+ Hours of AACSB Required Finance
- AT&T Chancellor's Fellow 2005-2008

Morehouse College Atlanta, Georgia 1999

- **B.A. in Economics** (mathematics minor) ***cum laude***
- Dean's List 1995-1999
- Omicron Delta Epsilon (honors society for Economics) 1999

Academic Experience

2017-Present **University of North Texas at Dallas** Dallas, Texas
Associate Professor of Finance (tenured)

Program Coordinator 2017-2020

Chair of Finance Program

- Initiated curricular updates including courses for Personal Financial Planning Track and Credit Analysis Certificate
- Coordinated Course Scheduling
- Advised students and permitted curricular transfers and exceptions
- Managed Finance and Economics tenure track professors
- Recruited and Managed Finance adjunct professors
- Student recruitment facilitator (15% enrollment growth)
- Created and served as faculty advisor for Personal Finance and Investment student group
- Cultivated and initiated a professional development initiative with Goldman Sachs

Classes Taught

Fina 5170 *Financial Management*- Tools and techniques used and proposed in corporate financial management. Analysis of the investment and financing decisions and the environment in which such decisions are made are covered in readings, case problems and class discussion.

Fina 4500 *International Finance*- International and regional financial institutions and arrangements; balance of payments, theory, adjustments and impact on world trade; role of commercial and central banks in financing international flow; financing exports and imports; the instruments and markets of foreign exchange; determination of exchange rates.

<u>Fina 4400</u> *Financial Markets and Institutions*- Studies the operations, mechanics and structure of the U.S. financial system. Topics include commercial banking, non-bank financial institutions, money and capital markets, the impact of monetary policy on financial institutions and markets, and an introduction to the international financial system.

<u>Fina 4360</u> *Retirement Planning*-Overview of retirement planning basics, retirement plans – both qualified and nonqualified, Social Security provisions, and government healthcare plans along with the basics of employee benefits; Focus on both quantitative (i.e. calculating retirement needs and plan limits) and qualitative (i.e. retirement age decisions, retirement income management) aspects of retirement.

<u>Fina 4350</u> *Insurance and Estate Planning*- Insurance and Estate Planning will explore risk management process and estate planning for individuals as part of the larger financial planning process. Different insurance solutions and applicable estate planning tools will be explored to meet the changing needs of individuals. Topics will include life, disability, long-term care, health, homeowners, auto and liability insurance as well as estate planning.

<u>Fina 4340</u> *Financial Planning for Professionals*- Financial planning from a professional perspective; applying basic financial, economic, and institutional concepts to advise individuals, families, and small businesses in achieving their financial goals. Tools and topics include financial analysis, budgeting, credit management, time value of money, investment strategies, income taxes, risk management, and retirement and estate planning.

<u>Fina 4320</u> *Financial Statement Analysis and Financial Decisions* - The analysis and interpretation of financial statements to aid in understanding short-term liquidity needs and long-term capital needs. This course involves managing growth, raising equity or debt financing, making investment decisions and designing an optimal capital structure.

<u>Fina 4310</u> *Valuation and Financial Decisions*- This course develops a conceptual valuation framework for investment, capital structure and dividend decisions. Each is examined for its impact on the risk return characteristics of the firm. In addition, long-term financing decisions are discussed.

<u>Fina 4300</u> *Financial Statement Analysis and Liquidity Management*- The analysis and interpretation of financial statements. Analyzing issues related to corporate liquidity. Problems and solutions related to the management of short-term assets and liabilities. Effective financial statement evaluation from the perspective of managers, investors, and creditors. Proforma statement development for effective financial management.

<u>Fina 4200</u> *Investments*- First course for the individual investor. Idea of investment value; necessary prerequisites for an investment program; policies; economic and industry factors; introduction to security analysis and valuation; operation of security markets; security laws.

<u>Fina 3770</u> *Finance*- Overview of money and the banking system; interest and present value calculations; financial information; analysis and financial decision making; security markets.

<u>Academic Committees and Service</u>

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Chairman of the UNTD ***Southern Gateway Park*** Impact Analysis Task Force, 2020-2021

Member of Doctoral Dissertation Committee: *Personality Traits and Life Insurance Ownership Among Older Americans*, Preston Cherry, Texas Tech University, Completed March 2020.

Member of Doctoral Dissertation Committee: *Consumer Biases in Choosing a financial planner using an experimental design,* Miranda Reiter, Kansas State University Completed July 2020.

Member of University Curriculum Committee, 2020- Present

Member of Academic Search Committee for Assistant Professor of Business Statistics for the School of Business, Fall 2021.

Member of Academic Search Committee for Assistant Professor of Finance for the School of Business, Summer 2019.

Faculty Advisor, UNTD Finance and Investment Club, 2020-2021

Program Coordinator for Finance Program, 2017- 2020

Member of School of Business Curriculum Committee, 2017- Present.

Member of Advisory Board, Sunset High School NAF Academy, 2019-Present

Member of Advisory Board, Woodrow Wilson High School NAF Academy, 2020-Present

Public Service

Southern Gateway Park Community Advisory Council Member, 2021-Present

National Financial Planning Association Competency Model Task Force Committee Member, 2021- Present.

FPA Nexgen Externship, Presenter on Careers and Diversity, 2022.

Dallas Black Chamber of Commerce: *University of North Texas at Dallas Leadership Program*, Selection Committee Member and Faculty Presenter, 2021

Carson Coaching Diversity Equity and Inclusion Complimentary Course, *ThinkAdvisor Luminary Award Winning Project,* Contributor/Presenter, 2021.

2015-2017 **The American College of Financial Services** Bryn Mawr, PA

Director of Academic Partnerships and Assistant Professor of Financial Planning

Academic Partnerships
Create relationships between other universities and The American College of Financial Services so that their students receive transfer credit into appropriate financial services designation programs and increase student interest in the designations and graduate degrees offered by the American College.

Provide American College assets such as texts and educational enhancement tools to partner schools so that they can increase the likelihood of financial services academic program success.

Create relationships between partner programs and the American College alums so that students have opportunities to interact with financial services professionals prior to graduation.

Promotion of Texts and Materials
Leverage current and initiate new relationships with financial planning program directors to promote the use and visibility of American College texts and materials.

Create media internally through the American College video studios, and externally by answering press requests, to increase the overall profile of the institution and knowledge about our offerings.

Recruiting Master's and PhD students
Work with academic partners, peer schools, and through appropriate industry organizations to recruit students into the MS financial services program and the MS management program.

Work with academic partners, peer schools, and through appropriate industry organizations to recruit students into the PhD in Financial and Retirement Planning program.

Course Instruction
Deliver lectures in online webinar format within the HS 328 Investments course.

Deliver lectures in online webinar format within the HS 333 Capstone for financial planning course.

Create video content and written text for the HS 300 Fundamentals of financial planning course.

2008-2015 **Texas A&M University-Commerce** Commerce, Texas
Assistant Professor of Finance

Classes Taught

Fin 512 *Advanced Security Analysis and Portfolio Management*- Graduate course provides a broad introduction to derivatives markets including options, futures, and swaps. Focuses on the integral part derivatives play in managing risk for multinational corporations, portfolio managers, institutional investors as well as market speculators.

Fin 504 *Advanced Financial Management*- Graduate course covering advanced corporate valuation. Topics include financial reporting, analysis, markets and regulations and global financial and ethical topics.

Fin 501 *Finance for Decision Makers*- Graduate course focusing predominately on intermediate comprehension of corporate finance and business management.

Fin 430 *Financial Planning*- Course focusing on advanced techniques of personal cash flow, asset and liability management, life cycle financial planning, investment management, tax planning, and retirement and estate planning.

Fin 410 *Analysis of Financial Derivatives*- Course focusing predominately on the introduction of futures, forwards and options. Focuses on the analysis and pricing of options and commodities and their practical application among corporations.

Fin 312 *Money, Banking, and Financial Markets*- Course provides an analytical framework that will enable one to understand, interact with, and operate in, financial markets and institutions.

Fin 304 *Introduction to Finance*- instruction and grading responsibility for a course designed to introduce students to the content areas of Finance.

Fin 391 *Honors Thesis Readings in Economics*- Honors course focusing on development of a thesis for attainment of honors designation upon graduation.

Eco 491 *Honors Thesis Readings in Finance*- Honors course focusing on development of a thesis for attainment of honors designation upon graduation.

Eco 233 *Economics of Personal Finance*- The course is designed to help students become prepared for a financially challenging world and to introduce the concepts and methods of personal financial planning. The financial planning process, time value of money, taxation, credit, housing, insurance, employee benefits, family economics and building a personal financial plan are explored.

Acct 576 *Fundamentals of Financial Planning*- Course focusing on professional use of advanced techniques of personal cash flow, asset and liability management, life cycle financial planning, investment management, tax planning, and retirement and estate planning.

Academic Committees and Service

Member of Doctoral Dissertation Committee: *Selecting successful peer financial education counselors*, Jared Pickens graduated, 2014.

Member of Academic Search Committee for Dean of the College of Business and Entrepreneurship for the University Fall 2013

Member of Academic Search Committee for Chief Human Resources Officer for the University Spring 2013

Member of Academic Search Committee for Assistant Professor of Finance Spring 2013

Member of Academic Search Committee for Assistant Professor of Finance/Economics Spring 2013

Member of Academic Search Committee for Grant Writer/Project Manager for the Graduate School 2011

Faculty Advisor B.A. in Finance (2010-2015) -advise undergraduate students on course selection, course sequencing, and other issues involving pursuit of a B.A. in Finance. Reinstitute the minor in Personal Financial Planning by selecting appropriate courses and marketing the program throughout the university community.

Member of University *Honors College Committee* (2010-2015) – interview prospective Honor's College students and participate on thesis committees when appropriate.
Chair for honors thesis for Callie Annett (2013-2014). Examining the prospect of re-opening a dollar theater in Commerce TX - In progress
Chair for honors thesis for Vikki Coronado (2012-2014). Examining Ethnic differences in student financial knowledge - In progress
Chair for honors thesis for Sarah Johnston (2012-2014). Do College students understand the costs of bank products? - In progress

Member of University Research and Creative Activities Committee 2011-2015

Member of University Studies Committee 2012-2015

College of Business *Learning and Teaching Committee*- Chair 2014-2015

College of Business and Technology *Curriculum Committee*- Chair 2013

College of Business and Technology *Assessment Committee*- 2013

College of Business and Technology *Excellence Committee*- Chair 2010, Member 2008-2011

College of Business and Technology *SACS Accreditation Committee*- 2011- 2015

Departmental *Scholarship Committee*, Member 2009-2015, Chair (2013-2015)

Certified Financial Planning Board Registered Certificate Program- *Program Director 2012*

Program Director –Managing the relationship with a third party marketer and education provider and maintaining insuring the educational validity of individuals seeking to obtain the Certified Financial Planning designation.

Retirement Course Instructor –Teaching a course designed to fulfill the requirements for instruction in the topic of retirement for the education component of the Certified Financial Planning designation.

Program Development – Assist Certificate Program Director in increasing revenue generated by the program.

Additional Program Development – Add revenue streams by assisting in securing contracts for programs in project management and social media within the professional development

2005-2008 **Texas Tech University** Lubbock, Texas

Graduate Teaching Assistant

PFP 4370/5370 *Capstone Course in Financial Planning*- instruction, WebCT maintenance, computer assignment assistance, and grading responsibility for a course designed to assess comprehensive financial planning analysis that incorporates all content areas in the major.

PFP1301 *Cultural Issues in Financial Planning*- instruction and grading responsibility for a course designed to increase the cultural awareness of students to enhance their effectiveness as financial planners in an ethnically diverse financial services environment.

Graduate Part Time Instructor

PFP1301 *Cultural Issues in Financial Planning*- sole responsibility for instruction and grading for the course designed to increase cultural awareness and professional effectiveness. *4.33/5.00 student rating*

Guest Lecturer

PFP 2315 *Personal Financial Planning for Professionals*- guest lecture covering the areas of financial services licensure and the professional environment of bank branch financial planning.

Course Design

PFP 5367 *Product, Prospecting, and Sales Skills in Personal Financial Planning*- created a course designed to give students exposure to communication, networking, and prospecting skills necessary to succeed in the increasingly competitive financial services industry. The course also introduced students to the products and strategies currently used to implement financial plans, and effective methods of explaining products to clients.

Grants

ING HBCU Initiative *Graduate Assistant (coordinator)*- responsibility for Summer Scholars program logistics and the recording and evaluating execution of a **$250,000** grant designed to aid in the creation of financial planning programs and increase financial literacy at Historically Black Colleges and Universities.

Professional Experience

2002-2005 **ABN AMRO Financial Services** Chicago, IL
Financial Consultant

Marketed financial services to Lasalle bank customers and outside prospective clients.

Worked with branch personnel to optimize work-flow and meet production goals for all retail products.

Series 7, 66, Life and Health as well as Long-Term Care Insurance Licensed.

2001-2002 **ABN AMRO North America** Chicago, Illinois
Collateralized Debt Obligation Portfolio Administrator

Oversaw multiple securitized portfolios backed by bank loans and bonds.

Directly reviewed each portfolio for reconciliation and collateral compliance, also reviewed output created by analytic and investor reporting systems.

1999-2001 **ABN AMRO North America** Chicago, Illinois
Finance Associate

Rotated through a 24-month program designed to expose participants to relevant areas within bank finance.

Research Experience

Peer Reviewed Publications

Reiter, M., Seay, M., MacDonald, M., Lutter, S., & Loving, A. (2022). Are there racial and gender preferences when hiring a financial planner? An experimental design on diversity in financial planning. Journal of Financial Counseling and Planning, 33(3), 344-357. https://doi.org/10.1891/JFCP-2021-0027 [2021 Rank by Journal Citation Indicator: 219/572 Economics; 132/296 Business]

Reiter, M., Seay, M., & Loving, A. (2022). Diversity in financial planning: Race, gender, and the likelihood to trust a financial planner. Financial Planning Review, 5(1), 1-13. https://doi.org/10.1002/cfp2.1134 [No impact factor or ranking within discipline]

Harness, N, Edelman, D. and Loving, A.C. (2013) Estate Planning Opportunities in 2012 and beyond, *GSTF Business Review* Volume 2 Issue (3). (DOI**:** 10.5176/2010-4804_2.3.212**.)** (Indexing/Abstracting: EBSCO, CrossRef, Cabell's Directory, Proquest**)**

Loving, A.C., Finke, M. and Salter J. (2012). Explaining the 2004 Decrease in Minority Stock Ownership. *The Review of Black Political Economy* Volume 39 Issue (4), 403-425. (Indexing/Abstracting: EBSCO, Econlit, Cabell's Directory, ProQuest**)** [Impact Factor .172]

Loving, A.C., Finke, M. and Salter J. (2012). Does Home Equity Explain the Black Wealth Gap? *Journal of Housing and the Built Environment* Volume 27 Issue (4) 427-451. DOI 10.1007/s10901-011-9256-3 (Indexing/Abstracting: EBSCO, ProQuest) [Impact Factor .577]

Loving, A.C., and Harness, N. (2012). Financial Planning for the Prince and the Pauper: A commentary on very different skill sets, tools, and time constraints. *GSTF Business Review* Volume 1 Issue (3) 31-32. (GBR - Print ISSN: 2010-4804, E-periodical: 2251-2888) (Indexing/Abstracting: EBSCO, CrossRef, Cabell's Directory, Proquest**)**

Loving, A.C., Harness, N. and Winchester D. (2012). Finishing School: Integrating sales skills and product knowledge into financial planning education*. GSTF Business Review* Volume 1 Issue (3) 96-98. (GBR - Print ISSN: 2010-4804, E-periodical: 2251-2888) (Indexing/Abstracting: EBSCO, CrossRef, Cabell's Directory, Proquest**)**

Klungerbo, B. and Loving, A.C. (2012). The effect of credit default swaps on the recent financial crisis. *GSTF Business Review* Volume 1 Issue (3) 33-35. (GBR - Print ISSN: 2010-4804, E-periodical: 2251-2888) (Indexing/Abstracting: EBSCO, CrossRef, Cabell's Directory, Proquest**)**

Additional Publications

Loving, A. (Feb 2022) UNT System Human Resources: Ask An Expert featuring Dr. Ajamu C. Loving. Ask an Expert: Ajamu Loving, UNT Dallas (untsystem.edu)

Loving, A. (2021). Fundamental Fairness and Genuine Care. *Journal of Financial Planning*, *34*(6), 18.

Dean, L, Loving, A.C. et al. (2021) Financial Planning Career Paths: Building more Sustainable and Successful Business. CFP Board Center for Financial Planning Press.

Loving, A., Fernandez, D., Singhania, M., Tomaneng, G., Boyd K. (2019). A Candid Discussion on Diversity. *Journal of Financial Planning*, *32*(5), 20-25.

Lemoine, C, and Loving, A.C. eds. (2016) Financial Planning: Process and Environment 6th edition. Bryn Mawr, PA. The American College Press.

In progress

Loving, A.C., Dr. Loving's Financial Workbook for Couples, **In progress.**

Loving, A.C., Finke, M. and Salter J. Driving While Black: The Impact of Conspicuous Vehicle Consumption on Black Income and Wealth, **Revise and resubmit requested.**

Winchester, D. and Loving, A.C. The effects of darker skin pigmentation on income and wealth growth, **In progress.**

Loving, A.C. and Harness, N., Using a reverse mortgage to increase an inheritance: Why is this a compelling strategy? **In progress.**

Refereed Conference Proceedings

Loving, A.C. and Finke, M. (2011) Can Differences in Home Equity Appreciation Help Explain the Black Wealth Gap? Consumer Interests Annual 57.

Loving, A.C., Finke, M., and Huston, S.J. (2010) *The Impact of Conspicuous Vehicle Consumption on Black Income and Wealth* Consumer Interests Annual 56.

Jasper, J.R. and Loving, A.C. (2006) *The Case for Financial Planning Programs at HBCUs*, BOTA Think Tank

Invited Presentations

Loving, A.C. (2023- August) *University of Illinois, Technology Course Guest Lecture-* Fintech in Focus- Preparing for the Financial Planning Engagements of the Future

Loving, A.C. (2023- August) *Raymond James PCG Regional Conference- New Jersey* - The Business Case for Diversity: Preparing to meet the needs of the client of the future.

Loving, A.C. (2023- August) *Raymond James PCG Regional Conference- Atlanta* - The Business Case for Diversity: Preparing to meet the needs of the client of the future.

Loving, A.C. (2023- June) *Lincoln Financial Online Staff Forum 2023*- The Future of Financial Advice

Loving, A.C. (2023- June) *Merrill Lynch Black African American Advisors Network*- The Business Case for Diversity: Preparing to meet the needs of the client of the future. (mainstage keynote)

Loving, A.C. (2023- June) *Wells Fargo Growth Summit*- The Future of Advice: Being the lead FA the Behavioral Way

Loving, A.C. (2023- April) *LPL Headquarters Executive Showcase* - The Future of Financial Advice

Loving, A.C. (2023- March) *Wells Fargo Growth Summit* - The Business Case for Diversity: Preparing to meet the needs of the client of the future.

Loving, A.C. (2023- March) *Raymond James PCG Regional Conference* - The Business Case for Diversity: Preparing to meet the needs of the client of the future.

Loving, A.C. (2023- February) *Raymond James Black Financial Advisor Network National Conference* - The Business Case for Diversity: Preparing to meet the needs of the client of the future.

Loving, A.C. (2023- January) *Wells Fargo Home Office Symposium* - The Future of Financial Advice

Loving, A.C. (2022- November) *Avantax Growth Conference* - The Business Case for Diversity: Preparing to meet the needs of the client of the future.

Loving, A.C. (2022- November) *Wells Fargo Latino Summit* - The Business Case for Diversity: Preparing to meet the needs of the client of the future.

Loving, A.C. (2022- October) *Ameriprise 2022 Fall AFG Regional Growth Summit-Upper Midwest Region* - The Future of Financial Advice

Loving, A.C. (2022- October) *Ameriprise 2022 Fall AFG Regional Growth Summit; Pacific West Region* - The Future of Financial Advice

Loving, A.C. (2022-October) *Lincoln Financial Group African American Advisor Network National Conference* - The Business Case for Diversity: Preparing to meet the needs of the client of the future.

Loving, A.C. (2022- October) *Ameriprise 2022 Fall AFG Regional Growth Summit-Southern* - The Future of Financial Advice

Loving, A.C. (2022-September) *Ameriprise 2022 Fall AFG Regional Growth Summit-Northeast* - The Future of Financial Advice

Loving, A.C. (2022-September) *Ameriprise 2022 Fall AFG Regional Growth Summit-Mid Atlantic* - The Future of Financial Advice

Loving, A.C. (2022-August) *Financial Planning Association- FPA Gathering NexGen Gathering National Conference* - The Business Case for Diversity: Preparing to meet the needs of the client of the future (keynote speaker)

Loving, A.C. (2022-June) *Raymond James Black Financial Advisor Network BFAN National Conference* - The Business Case for Diversity: Preparing to meet the needs of the client of the future

Loving, A.C. (2022-June) *Wyomissing Advisory Summit (Virtual)*- The Future of Financial Advice (keynote speaker)

Loving, A.C. (2022-May) *Wells Fargo Southwest Regional Conference (Dallas)* - The Business Case for Diversity: Preparing to meet the needs of the client of the future

Loving, A.C. (2022-April) *Charles Schwab National Conference*- Navigating the Multigenerational Workplace (keynote speaker)

Loving, A.C. (2022-April) *Charles Schwab SPC National Retirement Summit (Virtual)*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2022-February) *Macquarie Black History Month Event (Virtual)* - The Business Case for Diversity: Preparing to meet the needs of the client of the future

Loving, A.C. (2022-February) *Macquarie Black History Month Event* – Understanding the Racial Wealth Gap.

Loving, A.C. (2022-February) *Financial Planning Association FPA Dallas* - The Business Case for Diversity: Preparing to meet the needs of the client of the future

Loving, A.C. (2022-January) *LPL Digital Investment Services*- Retirement Drawdown Discussion with Dr. Loving (featured speaker)

Loving, A.C. (2021-November) *Commonwealth National Meeting (Virtual)*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2021-October) *Dallas Black Chamber of Commerce Business Leadership Program* – Finance Modules of the Executive Program

Loving, A.C. (2021-September) *UBS Virtual Vision Conference (Virtual)* - The Business Case for Diversity: Preparing to meet the needs of the client of the future

Loving, A.C. (2021-September) *Financial Planning Association FPA Minnesota (Virtual)* - The Business Case for Diversity: Preparing to meet the needs of the client of the future

Loving, A.C. (2021-September) *Ameriprise Financial Jambalaya Group Senior Financial Advisor Conference* - The Business Case for Diversity: Preparing to meet the needs of the client of the future

Loving, A.C. (2021-August) Ameriprise Financial Jambalaya Group Associate Advisor Conference- The Future of Financial Advice

Loving, A.C. (2021-August) *Ameriprise Financial Regional Webinar*- The Future of Financial Planning

Loving, A.C. (2021-July) *Securian Allied Wealth Partners Meeting (Keynote)*- The Future of Financial Advice.

Loving, A.C. (2021-June) *Avantax National Conference Dallas (Keynote)*- The Future of Financial Advice.

Loving, A.C. (2021-May) *Lincoln Financial Network Lincable Mentorship (Keynote)*- The Business Case for Diversity: Preparing to meet the needs of the client of the future

Loving, A.C. (2021-February) *Waddell & Reed Monthly Compliance Webinar (National Webinar)*- The Business Case for Diversity: Preparing to meet the needs of the client of the future

Loving, A.C. (2021-February) *Raymond James Black Financial Advisor Network (National Webinar)*- The Business Case for Diversity: Preparing to meet the needs of the client of the future

Loving, A.C. (2020-December) *Avantax Wealth Management Virtual Forum (National Webinar)*- Diversity and Demography: Preparing to meet the needs of the client of the future

Loving, A.C. (2020-October) *LPL Women Lead E-Forum (National Webinar)*- Diversity and Demography: Preparing to meet the needs of the client of the future

Loving, A.C. (2020-October) *Maryland Supplemental Retirement Program Virtual Symposium*- Talking to your Spouse about Finances

Loving, A.C. (2020-October) *Ameriprise Financial WMS Huddle (National Webinar)*- Business Value of Diversity (keynote speaker)

Loving, A.C. (2020-September) *RBC Digital Managed Solutions Symposium (National Webinar)*- Business Value of Diversity (keynote speaker)

Loving, A.C. (2020-August) *Ameriprise Global Inclusion Week (Global Webinar)*- Business Value of Diversity (keynote speaker)

Loving, A.C. (2020- April) Career Services Speaker Series and Investment and Finance Club (University of North Texas at Dallas, Dallas TX)- Alternative Investments (featured speaker)

Loving, A.C. (2020-February) *Lincoln Financial Third-Party Administrators Annual Meeting (Phoenix AZ)*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2020-February) *Lincoln Financial Network ABS Annual Sales Meeting (Dallas, TX)*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C., Kelton, S., Kelly, D. (2019-October) *Financial Planning Association 2019 Annual Conference (FPA National, Minneapolis MN)*- 2020 Vision: The Economic and Investment Outlook (General Session Moderator)

Loving, A.C., Wright, J., Augsburger, K. (2019-October) *National Association of Personal Financial Planners 2019 Annual Conference (NAPFA, Chicago, IL)* - Creating the Workplace of the Future (panelist)

Loving, A.C. (2019-July) Career Services Speaker Series and Investment and Finance Club (University of North Texas at Dallas, Dallas TX)- How to Invest (featured speaker)

Loving, A.C. (2019-July) *UBS Wealth Advisor Program Conference*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2019-June) *HD Vest Connect 2019 Conference*- The Millennial Mindset: Attracting the next generation of clients

Loving, A.C. (2019-June) *HD Vest Connect 2019 Conference*- Diversity and Demography: Preparing to meet the needs of the client of the future

Loving, A.C. (2019-June) *Lincoln Financial Services Enterprise Meetings (Wells Fargo, Fort Worth, TX)*- The Millennial Mindset: Attracting the next generation of clients

Loving, A.C. (2019-June) *Lincoln Financial Services Enterprise Meetings (Wells Fargo, San Antonio, TX)*- Diversity and Demography: Preparing to meet the needs of the client of the future

Loving, A.C. (2019-June) *Lincoln Financial Services Enterprise Meetings (Morgan Stanley, Dallas, TX)*- The Millennial Mindset: Attracting the next generation of clients

Loving, A.C. (2019-May) *Financial Planning Association DFW 2019 Annual Conference*- Diversity and Demography: Preparing to meet the needs of the client of the future

Loving, A.C. (2019-April) *Merrill Lynch Strategic Growth Symposium*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2019-April) *UBS Wealth Advisor Program Conference*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2019-March) *Wells Fargo Advisors National Diversity Day 2019*- Diversity and Demography: Preparing to meet the needs of the client of the future (keynote speaker)

Loving, A.C. (2019-February) Dallas Estate Planning Council's Emerging Professionals Education Event- Diversity and Millennials (panelist)

Loving, A.C. (2019-January) *Raymond James Complex Meeting*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2019-January) *Wells Fargo Client Experience and Growth Summit 2019*- Diversity and Demography: Preparing to meet the needs of the client of the future

Loving, A.C. (2018-October) *Lincoln Financial Network Fall Forum*- The Millennial Mindset: Attracting the next generation of clients

Loving, A.C., Wells, D., Oakley, D. (2018-October) *National Council on Teacher Retirement 2018 Annual Conference*- The Millennial Mindset: Understanding the Next Generation

Loving, A.C. (2018-October) Financial Planning Association 2018 Annual Conference- Economics of Diversity

Loving, A.C., Wells D. (2018-June) *National Association of Securities Professionals 2017 National Conference*- Diversity and Demography: Preparing to meet the needs of the client of the future (Panelist)

Loving, A.C. (2018- June) *Ameriprise Spring Workshop 2018*- The Millennial Mindset: Attracting the next generation of clients

Loving, A.C. (2018-March) *UBS Wealth Advisor Program Conference*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2018-February) *Raymond James Winter Symposium*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2017-October) *Morgan Stanley Central Region Meeting*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2017-October) *Raymond James Client Forum*- The Millennial Mindset: Attracting the next generation of clients

Loving, A.C. (2017-October) *Lincoln Financial LFN Fall Forum*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2017-October) *Citigroup CPWM National Investment Excellence Conference*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2017-September) *Raymond James PCG Chicago Regional Conference*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2017-September) *Lincoln Financial Client Forum*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2017-September) *Pershing Wealth Management Conference*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2017-August) *Lincoln Financial Client Forum*- The Millennial Mindset: Attracting the next generation of clients

Loving, A.C. (2017-August) *Wells Fargo BAA Summit*- The Millennial Mindset: Attracting the next generation of clients

Loving, A.C. (2017-August) *Raymond James Private Client Group*- The Millennial Mindset: Attracting the next generation of clients

Loving, A.C. (2017-June) National Association of Securities Professionals 2017 National Conference- The Millennial Mindset: (Panelist)

Loving, A.C. (2016-October) *Delaware Investments Annual Due Diligence Meeting*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2016-October) *Ameriprise Financial 2016 Private Wealth Advisor Professional Development Conference*- The Millennial Mindset: Attracting the next generation of clients

Loving, A.C. (2016-October) *Morgan Stanley Southeast Region Growth and Strategic Partnership Summit*- The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2016-October) *UBS MidSouth Florida Gulf Coast Leadership and Growth forum (top 50)* - The Millennial Mindset: Attracting the next generation of clients (keynote speaker)

Loving, A.C. (2016-June) *FPA NexGen Local Leaders Pre-conference* – Lead Today (keynote speaker)

Loving, A.C. (2013- Spring) *SBEcon Conference*- Gave a presentation highlighting important aspects of personal finance for small business owners.

Loving, A.C. (2012- November) *Guest Lecture for COB 111*- Gave an overview of personal budgeting and the importance of financial planning and goal setting in college and beyond.

Loving, A.C. (2012- April) *Guest Lecture for Freshman Success*- Gave an overview of personal budgeting and the importance of financial planning and goal setting in college and beyond.

Loving, A.C. (2012- April) *Guest Lecture for Economics*- Gave an overview of personal finance and the importance of financial planning for College Students transitioning to the professional world

Loving, A.C. (2011- October) *Speaker for University Wellness Program*- Gave an overview of personal budgeting and the importance of financial planning and goal setting in college and beyond

Media Appearances and Podcasts

Loving, A.C. Jensen, R. Cormier, K. (2022-May) *Envestnet Advisor Summit* – Multi-Generational Wealth Transfer Marketing Strategies (panelist)

Loving, A.C. Reiter, M. Yook, M. (2022-March) *Diversity Town Hall (Virtual)* – Recruiting and Retaining Diverse Talent to serve Diverse Client Needs (panelist)

Loving, A.C., (2021-October) *Carson Group Framework Podcast*- Wealth Building and Generational Planning for Minorites. (presenter)

Loving, A.C., (2021-April) *FPA Nexgen Externhsip*- Financial Planning as a career. (presenter)

Loving, A.C., (2021-January) *CUTE Foundation of Dallas*- How to make it on a budget. (presenter)

Loving, A.C., (2020-October) *Association of African American financial Advisors Annual Conference (Virtual)*- The role of HBCUs and other Higher Institutions of Learning can play in bridging the Wealth Gap in Black America. (panelist)

Loving, A.C., (2020-October) *I Voted Now What (Virtual Town Hall Meeting)*- Action After the V- Alert. A Black Agenda Beyond the Ballot. (panelist)

Loving, A.C., Wells D., Woodson A., (2020-August) *BREADren Podcast- Wealth Building and the racial wealth gap* (Panelist)

Loving, A.C., (2020-July) *Financial Planning Association DFW Nexgen Virtual Q&A*- Breaking Racial Barriers in Financial Planning (Featured Guest)

Loving, A.C., Wells D., Woodson A., (2020-April) *BREADren Podcast- Quarantine Special*- Individual and financial preparedness in a difficult time (Panelist)

Loving, A.C., Bell-Carlson M., Lemoine, C., Petersen J., (2020-March) *University of Illinois Extension Webinar*- Navigating your Personal Finances in a Time of Uncertainty (Panelist)

Loving, A.C., Miles-Mattingly E., (2020-March) *Minority Money Podcast*- Financial Planning for Families of Color featuring Ajamu C. Loving PhD CFP® (Panelist)

Loving, A.C., Caplan J., Campbell, G., Franco, L., (2020-January) *Urban Advantage Podcast-University of North Texas at Dallas* How to Increase Black Male student enrolment. (Panelist)

Loving, A.C., Wells D., Woodson A., (2019-November *BREADren Podcast 3 Ep 1*- 2020 Vision (Panelist)

Loving, A.C., Wells D., Woodson A., (2019-November) *BREADren Podcast- 2 Ep 5*- Economic Inclusion and the current State of Affairs (Panelist)