

# SAM ANDERSON IV, MBA, PMP, CB

## EDUCATION

Keller Graduate School of Management <b>Master of Accounting and Financial Management</b> Graduate Certificate in Accounting	2012
Keller Graduate School of Management <b>Master of Business Administration in Finance</b> Graduate Certificate in Financial Analysis	2010
University of Houston <b>Bachelor of Science in Economics</b> Minor: Entrepreneurship	2007

## AWARDS

Junior Achievement Dallas – Teacher of the Year 2019  
W.H Adamson – Teacher of the Year 2018  
National Academy Foundation – Distinguished Academy of Business and Finance 2018  
National Academy Foundation – Distinguished Academy of Business and Finance 2017  
National Academy Foundation – Model Academy of Business and Finance 2016  
National Academy Foundation – Model Academy of Business and Finance 2015  
National Academy Foundation – Certified Academy of Business and Finance 2016  
National Academy Foundation – Certified Academy of Business and Finance 2015

## TEACHING EXPERIENCE

University of North Texas at Dallas <b>Adjunct Faculty – Corporate Finance</b>	2018- Present
Working as Financial Analyst, students develop analytical skills by actively evaluating financial results of multiple businesses, interpreting results for stakeholders, and presenting strategic recommendations for performance improvement.	
Emmett J Conrad – Academy of Business and Finance <b>Academy of Business and Finance Teacher/Director – Securities and Investments</b>	2018 - 2019
Working as Financial Advisors, students make a pitch to a group of investors about the financial benefits of investing in their chosen stocks, bonds, mutual funds, ETF's, Forex's, Futures, REIT's, MLP's. The goal is to encourage the audience to invest based on the overview of fundamental and technical data that they present.	
<b>Academy of Business and Finance Teacher/Director – Insurance Operations</b>	2018 –2019
Working as Insurance Agents, students develop a commercial insurance needs assessment for a real company across a variety of industries. Students research the potential risks, regulations, and ethical issues related to insurance that the company might face and present a comprehensive needs assessment.	
<b>Academy of Business and Finance Teacher/Director – Business Practicum</b>	2018 –2019
Hands-on learning lab that provides practical learning experiences to strengthen individual performance in the workplace and in society and to make a successful transition to the workforce or postsecondary education.	
W.H Adamson – Academy of Business and Finance <b>Academy of Business and Finance Teacher/Director – Financial Planning</b>	2012 –2017
Working as Financial Planners, students create a basic financial plan for themselves as they imagine themselves to be at the age of 25. Student's complete sections of a financial planning template, setting financial goals, determining insurance needs, creating investment strategies, and planning for retirement.	

**Academy of Business and Finance Teacher/Director – Principles of Finance****2012 –2016**

Working as Financial Consultants, students lead a schoolwide exhibition on issues critical to financial literacy. Students choose a financial literacy topic to investigate and examine their topic from various perspectives, including its importance to an individual's understanding of finance as well as its relevance to the finance industry and society.

**Academy of Business and Finance Teacher/Director – Entrepreneurship****2015 –2017**

Working as Entrepreneurs, students creating a marketing plan for their business, make financial projections, assess the risks inherent in the new venture, and develop a code of ethics to guide their business actions

**Academy of Business and Finance Teacher/Director –Financial Analysis****2016 –2017**

Working as Financial Analyst, students develop analytical skills by actively evaluating financial results of multiple businesses, interpreting results for stakeholders, and presenting strategic recommendations for performance improvement.

**Academy of Business and Finance Teacher/Director –Business Practicum****2016 –2017**

Hands-on learning lab that provides practical learning experiences to strengthen individual performance in the workplace and in society and to make a successful transition to the workforce or postsecondary education.

**RELATED EXPERIENCE**

Anderson Family Office

**Managing Member****2020 - Present**

The Anderson Family Office mission is to protect, preserve, and perpetuate a legacy of generational wealth for families, professionals, business owners, and nonprofits using the "Generational Wealth Code".

Dallas ISD Career and Technical Education

**Industry Partner Coordinator****2019 - Present**

Work with district staff, school site staff, businesses, and community organizations to plan, develop and implement work-based learning relationships and systems; coordinate student work-based learning opportunities in Business, Finance, and Information Technology; and provide an on-going link between business and K-12 public education.

NAF Future Ready Lab

**Internship Supervisor (Summer)****2017- 2019**

Hands-on learning lab that provides practical learning experiences to strengthen individual performance in the workplace and in society and to make a successful transition to the workforce or postsecondary education.

Steppin Forward Investments

**Chief Investment Officer****2009 –2020**

Evaluate various Fortune 500 companies' obligations to determine future economic viability by using fundamental and technical analysis techniques, including Johnson & Johnson, Lowes, Exxon Mobil, Conoco Phillips, United Technology, Proctor & Gamble, Johnson Controls, and 3M Companies.

TechSkills

**Payroll Instructor****2009 –2012**

Prepared lesson plans that instruct students on all facets of the payroll process, including computing wages and salaries, social security taxes, income tax withholding, unemployment compensation taxes and analyzing and journalizing payroll transactions.

**Accounting/Bookkeeping Instructor****2009 -2012**

Prepared lesson plans that instruct students on all facets of the bookkeeping process, including computing wages and salaries, social security taxes, income tax withholding, unemployment compensation taxes and analyzing and journalizing payroll transactions.

**QuickBooks Instructor**

Prepared lesson plans that instruct students on all facets of the set-up chart of accounts, banking, customers and sales, vendors, purchases and inventory, employees' payroll, and generating reports.

PX3 Lubricants

**Accounting/Finance Associate****2007 - 2008**

Collect, process, verify, and report accounting related information as well as perform professional analytical and management support work assignments.

**ASSOCIATIONS**

Lemonade Day - Dallas

Accounting Career Awareness Program (SMU)

Texas Jump\$tart Coalition

Financial Inclusion Roundtable – United Way of Metropolitan Dallas

Texas Association of Black Personnel in Higher Education

One Step 2 Fitness