

Somer G. Anderson, Ph.D., CPA, CGMA, CFE

Curriculum Vitae

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Education

Ph.D.	Kansas State University	Personal Financial Planning	2019
M.Acc.	University of Missouri	Robert J. Trulaske, Sr. College of Business	2001
B.S.	University of Missouri	Robert J. Trulaske, Sr. College of Business <i>Major: Accountancy</i>	2001

Academic Appointments

University of Missouri

Robert J. Trulaske, Sr. College of Business

School of Accountancy

Associate Teaching Professor 2024 - Present

Becker Academy Coordinator 2024 - Present

Maryville University

John E. Simon School of Business

Associate Professor – Accounting and Finance 2022

Tenure Granted 2022

Assistant Dean – Accounting, Economics, and Finance 2017 - 2020

Assistant Professor - Accounting 2015 - 2021

Program Director – Accounting 2015 - 2017

Kansas State University

Institute of Personal Financial Planning

Graduate Research Assistant 2016 - 2019

Fontbonne University

Eckelkamp College of Global Business

Accounting Program Director 2010 – 2015

Accounting Instructor 2010 – 2015

Professional Designations

Certified Public Accountant (CPA)
Chartered Global Management Accountant (CGMA)
Certified Fraud Examiner (CFE)

Accounting and Finance Industry Experience

Association of International Certified Professional Accountants – Durham, North Carolina
Senior Manager, Curriculum Writing 2022-2024

BJC Healthcare-St. Louis, Missouri
Finance Manager-Information Systems 2006-2010

Duke Manufacturing Company-St. Louis, Missouri
Senior Accountant 2005-2006

BKD, LLP-St. Louis, Missouri and Colorado Springs, Colorado
Audit Supervisor 2001-2005

University Teaching Experience

Traditional On-Ground Instruction, Maryville University
Financial Accounting
Principles of Finance
Managerial Accounting
Accounting Information Systems
Auditing
Business Statistics

Fully Online Instruction, Maryville University
Financial Data Analytics
Emerging Technologies in Accounting and Finance
Individual Income Tax
QuickBooks for the Accountant
Financial Accounting (MBA)
Managerial Accounting (MBA)
Principles of Finance

Traditional On-Ground Instruction, Fontbonne University
Financial Accounting
Managerial Accounting
Individual Income Tax
Auditing
Cost Accounting
Forensic Accounting and Fraud Examination
Intermediate Accounting I

Intermediate Accounting II
Advanced Auditing, Dissecting Financial Statements (MACC)
Accounting Research and Analysis (MACC)
Non-Profit Financial Management (MACC)
Professional Development for Business Students

Fully Online Instruction, Fontbonne University
Financial Accounting
Accounting and Budgeting for Managers (MBA)

Online Course Development Experience

University of Missouri
Becker Academy: Financial Accounting Foundations

Maryville University
Financial Data Analytics
Emerging Technologies in Accounting and Finance
Financial Accounting (MBA)
QuickBooks for the Accountant

Fontbonne University
Financial Accounting
Accounting and Budgeting for Managers (MBA)

Consulting Experience

Investopedia, *Financial Review Board*

The Balance, *Financial Review Board*

Moonshot Marketing, *Expert Financial Reviewer*

Annuity.org, *Financial Expert*

Awards

Outstanding Teaching Award, 2022, Maryville University
Faculty Spotlight Award, 2022, Maryville University
Excellence in Teaching Award, 2020, ACBSP Region 5
Robert O. Herrmann Dissertation Award, 2020, American Council on Consumer Interests
Outstanding Research Award, 2019, Kansas State University

Published Peer-Reviewed Journal Articles

- Cudney, E., **Anderson, S.G.**, Beane, R., Furterer, S., Mohandas, L., Laux, C. (2023). Using the voice of the student to identify perceptions of teaching effectiveness attributes: A pilot study. *Quality Assurance in Education*, 31(3), 485-503.
- Cudney, E., **Anderson, S.G.**, et al. (2023). Micro credentials in higher education: A systematic review of the literature. *The Transnational Journal of Business*.
- Anderson, S.G.**, Heckman, S., & Lawson, D. (2022). The Influence of financial literacy on financial behaviors: Evidence from mandatory federal student loan entrance counseling. *Journal of Family and Consumer Sciences*. Volume 114, No. 3.
- Horwitz, E., Seay, M.C., Archuleta, K.L. & **Anderson, S.G.** (2021). Workplace financial education and change in financial knowledge: A quasi-experimental approach. *Journal of Financial Counseling and Planning, Special Issue: Financial Education*.
- Tharp, D., Seay, M., Stueve, C., & **Anderson, S.G.** (2019). Financial satisfaction and homeownership. *Journal of Family and Economic Issues*.
- Kim, K.T., Lee, J.M., & **Anderson, S.G.** (2019). Retirement saving habits of business owning families in the United States. *Family & Consumer Sciences Research Journal*.
- Anderson, S.G.**, Lawson, D., Seay, M., & Kim, K. (2018). Advisor compensation: Which clients know and how do they pay? *Financial Services Review*.
- Kim, K. T., **Anderson, S.G.**, & Seay, M.C. (2018). Financial knowledge and short-term and long-term financial behaviors of millennials in the United States. *Journal of Family and Economic Issues*.
- Seay, M., **Anderson, S.G.**, Carswell, A., & Neilson, R. (2018). Characteristics of rental real estate investors during the 2000s. *Journal of Financial Counseling and Planning*.
- Seay, M., **Anderson, S.G.**, Lawson, D., & Kim, K. (2017). Identifying variation in client characteristics between financial planning compensation models. *Journal of Financial Planning (and featured in Best of 2017 Special Issue)*.

Dissertation

- Anderson, S.G.** (2019). Mortgage Debt and Retirement Transition Decisions (Doctoral Dissertation). Winner, Robert O. Herrmann, Ph.D., Dissertation Award. (2020). Presented at the ACCI Annual Conference. (2020).

Articles and Research in Progress

- Cudney, E., **Anderson, S.G.**, Furterer, S., Laux, C., & Mohandas, L. Topic: Financial metrics used to measure lean project effectiveness.

Peer-Reviewed Conference Presentations and Proceedings

- Cudney, E., **Anderson, S.G.**, Beane, R., Furterer, S., Mohandas, L., Elshennaway, E., & Laux, C. (2023). *Understanding teaching effectiveness attributes from the student's perspective*. Proceedings of the International Conference on Lean Six Sigma, Newcastle, UK.
- Ogunmodede, S., Cudney, E., **Anderson, S.G.**, Furterer, S., Laux, C., & Mohandas, L. (2023). *Determining financial performance metrics of continuous improvement initiatives*. Institute of Industrial and Systems Engineer Annual Conference, New Orleans, Louisiana.
- Cudney, E., **Anderson, S.G.**, Beane, R., Ruterer, S., Mohandas, L., Laux, C., & Elshennaway, E. (2023). *Improving customer satisfaction using the Kano model*. European Organization for Quality (EOQ) Congress, Porto, Portugal.
- Cudney, E., Anderson, S.G., Beane, R., Furterer, S., Mohandas, L., & Laux, C. (2022). *Analyzing the voice of the customer in the era of quality 4.0*. International Academy of Quality, Tokyo, Japan.
- Magwegwe, F. & **Anderson, S.G.** (2021). *Financial and psychological coping resources as mediators and moderators between chronic stress and retirement income worry*. International Academy of Financial Consumers Annual Conference, Global Forum for Financial Consumers, Seoul National University, Seoul, Korea
- Anderson, S.G.**, Haselwood, C., & Seay, M.C. (2018). *Financial knowledge and financial confidence as mediators between gender and positive financial behaviors*. Academy of Financial Services Conference, Chicago, Illinois.
- Fernat, F. and **Anderson, S.G.** (2018). *The association of cognitive abilities and wealth: A comparison of elderly married and non-married households*. AICPA Engage Conference, Las Vegas, Nevada.
- Kim, K.T., **Anderson, S.G.**, & Seay, M. C. (2018). *Financial literacy and investment decisions of millennials in the United States*. Poster Presentation at the 2018 CFP Board Academic Research Colloquium for Financial Planning and Related Disciplines, Arlington, VA.
- Anderson, S.G.**, Archuleta, K. L., Lauderdale, M. K., Potter, D. R., & Yacob, D. K. (2017). *Financial satisfaction: A quasi experimental design using solution focused brief therapy*. Lightning Presentation at the 2017 Financial Therapy Association Conference, San Diego, CA.
- Anderson, S.G.**, Heckman, S. J., & Lawson, D. R. (2017). *Student loan entrance counseling effectiveness*. Poster Co-Presentation with D. R. Lawson at the 2017 Kansas State University Institute of Personal Financial Planning Practitioner-Oriented Poster Forum, Manhattan, KS. – 1st Place Prize.
- Seay, M. C., **Anderson, S G.**, Lawson, D. R., & Kim, K. T. (2017). *Variation in client characteristics between financial planning compensation models*. Poster Co-Presentation with D. R. Lawson at the 2017 Kansas State University Institute of Personal Financial Planning Practitioner-Oriented Poster Forum, Manhattan, KS. – 3rd Place Prize.

Bartholomae, S., **Anderson, S.G.**, Dorius, S., Fox, J. J., Heckman, S. J., Jorgensen, J. B., Letkiewicz, J., & Montalto, C. P. (2017). *Student Loan Counseling: Perceptions and Impacts*. Conference Proceedings at the American Council of Consumer Interests 2017 Annual Meeting, Albuquerque, NM.

Anderson, S.G. & Heckman, S. (2017). *Perceptions and Impacts of Student Loan Entrance Counseling*. Paper presented as part of the 2017 Collegiate Financial Wellness Symposium at the National Association of Student Affairs Administrators in Higher Education Conference in Washington, D.C.

Anderson, S.G. & Heckman, S. (2017). *Perceptions and Impacts of Student Loan Entrance Counseling*. Paper presented as part of the Student Loan Entrance Counseling Symposium at the American Council of Consumer Interests 2017 Annual Meeting, Albuquerque, NM.

Invited Presentations, Op-Eds, White Papers, and Community Presentations

Cudney, E., **Anderson, S.G.**, Beane, R., Furterer, S., Mohandas, L., & Laux, C. (2022). *Integrating the voice of the student in course design using the Kano model*. Keynote- International Conference on Lean Six Sigma for Higher Education, Abu Dhabi, UAE. Funded presentation by Khalifa University.

Cudney, E., **Anderson, S.G.**, Beane, R., Furterer, S., Mohandas, L., & Laux, C. (2022). *Analyzing the voice of the customer in the era of quality 4.0*. International Academy of Quality, Tokyo, Japan.

Anderson, S.G. & Solomon, J.D. (2019). *Student loan counseling: Time for a refresh?* University Business.

Johnson, D. & **Anderson, S.G.** (2017). *An Analysis of the Consumer Financial Protection Bureau, August 2017 Report*, White Paper for American Advisors Group.

Anderson, S.G., Haselwood, C., & Seay, M.C. (2018). *Financial knowledge and financial confidence as mediators between gender and positive financial behaviors*. Woudenberg, the Netherlands at LEF Foundation.

Invited Peer Reviewer

Family and Consumer Sciences Research Journal
Financial Services Review
International Journal of Consumer Studies
Journal of Financial Counseling and Planning
American Council on Consumer Interests Annual Conference

Service to John E. Simon School of Business

Award Nomination Committee, 2021-2022
Search Committee Chair, Finance faculty member and Assistant Dean, 2021-2022
Advisor Maryville Financial Management Association, 2019-2022
Delta Mu Delta Chapter Advisor, 2018-2022
Assistant Dean – Accounting, Economics, and Finance, 2017-2020

ACBSP Accreditation Co-Champion, 2018-2020
Simon School of Business Curriculum and Assessment Committee, Chair, 2018-2019
Search Committee Member, Business faculty member, 2018-2019 (two positions)
Search Committee Member, Accounting faculty member, 2018
Search Committee Chair, Director of Operations-Simon School of Business, 2018
Search Committee Member, Accounting faculty members (two), 2016-2017
Program Director – Accounting, 2015-2017
Search Committee Member, Dean of the John E. Simon School of Business, 2015-2016
Search Committee Chair, Cybersecurity faculty members (two), 2015-2016
Search Committee Member, Information Systems faculty member, 2015-2016

Service to Maryville University

Maryville Student Faculty Hearing Committee, 2021-2022
Core Fluency Development Workgroup, 2021-2022
Presenter at Perspectives Week, Direct and Indirect Assessment, 2021
Maryville Core Curriculum Implementation Committee 2020-2021
Maryville Faculty Curriculum Committee, 2018-2020
Maryville Sabbatical Committee, 2018-2019
Search Committee Member, Healthcare Management faculty member, 2018
Early Alert University Committee, 2016-2018

Service to Fontbonne University

Volunteer Income Tax Assistance (VITA) Program Coordinator, 2010-2015
Faculty Advisor and Founder, Fontbonne Business Club, 2010-2015
College of Global Business Curriculum Committee Member, 2010-2015
University Curriculum Committee Member, 2011-2015
Search Committee Member, Cybersecurity faculty member, 2014-2015
Search Committee Member, College of Global Business Dean, 2013-2014
Search Committee Member, Finance faculty member, 2013-2014
Dedicated Semester University Committee Member, 2011-2012

Service to the Community

Rung for Women, Educator and Social Capital Committee Member, 2021-present
MOCPA Information Technology Committee, 2021-2022
Cub Scout Pack Treasurer, Pack 362, 2017-2021
Maplewood Parks and Recreation Commission, 2014-2017
Maplewood Early Childhood Center Parent Board, 2013-2017

Professional Associations

Academy of Financial Services
American Council on Consumer Interests
American Institute of Certified Public Accountants
Association of Certified Fraud Examiners
Missouri Society of Certified Public Accountants

Honor Society Memberships

Phi Kappa Phi
Kappa Omicron Nu
Delta Mu Delta

Relevant Professional Development and Continuing Professional Education

- 2024 Active Learning with Digital Escape Games – Mizzou
- 2024 Information Technology for Accounting and Finance Professionals - Certificate
- 2024 Ethics Update and Refresher
- 2024 Ethical Issues in Non-Profits
- 2023 Town Hall Series – AICPA
- 2023 Risk Assessment Under SAS No. 145
- 2023 Annual Update for Accountants and Auditors
- 2023 Applying Professional Skepticism in an Audit
- 2023 Overview: Yellow Book: Staying Compliant with Governmental Auditing Standards
- 2023 Transformative Skills Pack: Strategic Thinking Mindset
- 2023 Governmental Accounting and Auditing Update
- 2023 SOC for Service Organizations Deep Dive
- 2023 SOC2 Reporting on an Examination of Controls at a Service Organization
- 2022 AICPA Certificate: Robotic Process Automaton Strategy for Business Leaders
 - Understanding Robotic Process Automation
 - Building your RPA Strategy
 - Preparing for RPA Implementation and Cultural Shift
- 2022 AICPA Certificate: Retirement Planning
 - The Retirement Planning Process
 - Governmental and Employer Retirement Plans Process
 - Personal Retirement Investments, Income, and Expenses
 - Analyzing Client Retirement Data
 - Creating, Implementing, and Monitoring the Retirement Plan
 - Elder and Special Needs Planning
- 2022 AICPA Certificate: Risk Management and Insurance Planning
 - The Risk Management Planning Process
 - Insurance Contracts and Needs Analysis
 - Life Insurance
 - Annuities
 - Medical, Disability, and Property and Casualty Insurance
 - Group Insurance and Employee Benefits

- Executive and Deferred Compensation Arrangements
 - Financial Planning with Business Owners
- 2022 AICPA Certificate: Investment Planning
- Investment Planning Process
 - Investment Data Gathering and Analysis
 - Creating the Investment Policy Statement
 - Portfolio Management
 - Investment Vehicles and Strategies
 - Investment Monitoring and Updating
 - Integrating Investments with the Financial Plan
 - Education Planning
- 2022 Town Hall Series - AICPA
- 2022 Charitable Planning – AICPA
- 2022 Professional Ethics: The American Institute of Certified Public Accountants’ Comprehensive Course
- 2022 Calculating Financial Benefits from Improvement Activities – Lean Portland
- 2022 MO CPA Educators’ Roundtable, CPA Exam Evolution - BAR
- 2022 Deloitte Foundation Center for Business Analytics, Teaching Analytics and Technology Ethics
- 2022 LinkedIn Certificate Course: Tableau Essential Training
- 2022 MO CPA Educator and Firm Leadership Forum
- 2021 CPA Model Curriculum Insights (Becker Webinar)
- 2021 International Academy of Financial Consumers Annual Conference
- 2021 American Accounting Association CPA Evolution Model Curriculum Launch
- 2021 ACBSP, The CPA Evolution and Accounting Model Curriculum
- 2021 MO CPA Educators’ Roundtable, Power BI Training
- 2021 Dr. Martin Luther King Jr. Celebration with Dr. Joy DeGruy and Professional Staff Workshop
- 2020 MO CPA Educators’ Roundtable, Teaching Through the Pandemic
- 2020 Missouri Association of Accounting Educators Conference
- 2020 MO CPA Midwest Blockchain Conference
- 2020 American Council on Consumer Interests (ACCI) Conference
- 2020 ACBSP Virtual Conference
- 2020 LinkedIn Certificate Course: AI in Fintech
- 2019 Don’t Panic About Teaching US Bank Panics – St. Louis Federal Reserve
- 2019 MO CPA Midwest Blockchain Conference
- 2019 Study Abroad Trip to Lugano, Switzerland
- 2019 Missouri Association of Accounting Educators Conference
- 2019 ACBSP Access Accreditation Workshop
- 2018 Academy of Financial Services Conference
- 2018 Study Trip to Belgium and the Netherlands
- 2018 CFP Board Academic Research Colloquium
- 2017 Financial Therapy Conference
- 2017 American Council on Consumer Interests (ACCI) Conference
- 2017 NASPA Symposium on Collegiate Financial Well-being
- 2015-2022 REAL and Perspectives Weeks at Maryville University