

2024 Fall Report - Department of Finance

This is a partial list of activities and accomplishments in the department completed during fall of 2024

- A new course FINA 202 Client Psychology and Relationship Management in Finance and Business was successfully proposed and approved. It will meet the standards of the CFP Board. Our financial planning is CFP Board approved since 2002.
- We hosted the first ever "[Finance Career Day](#)" with seventy seven students actively engaging for internships and jobs with ten different employers on September 17, 2024.
- The department hosted the Department of Finance Advisory Council on Friday, December 6, 2024. At the meeting, students from the Practicum in Portfolio Management class (FINA 449) presented an overview of the Sea Gull Fund portfolio to advisory council members. The fund is currently valued at over \$2.3 million.
- The FINA 101: Wealthy, Healthy and Happy: The Basics, a new General Education course under the Wellness category was successfully offered in three sections with a total enrollment of 75 students. This is the first time a financial literacy course is offered to all SU students. Given the demand, eight sections are offered in 2025 spring semester.

Applied Learning projects

- With two different trading challenges, Dr. Asli Eski in FINA 441 Investments (investment banking) and Dr. Ani Mathers in FINA 440 Corporate Finance courses (mergers & acquisition) organized [AmplifyMe](#) Finance Accelerator simulated trading giving students a hands-on approach of markets.
- Students in Dr. Asli's FINA 321 Financial Modeling course completed six assignments from the Microsoft Excel Collegiate Challenge (MECC), a program designed for college and university students to enhance their Excel proficiency through engaging challenges and competitions.

Stock Market Challenge workshops, Maryland Council on Economic Education (MCEE)

- On November 22, 2024, Dr. Ani Mathers conducted a workshop on investment basics for thirty students and two teachers from Parkside High School.
- On October 25, 2024, Dr. Leonard Arvi conducted a stock market challenge workshop for thirty students and three teachers of Stephen Decatur High School. Also, MCEE Executive Director, Mrs. Julie Weaver and Ms. Cindy Jones, Board member of MCEE attended this event.
- Two other schools, Bennett High and Snow Hill High rescheduled their visits to spring.
- We have six confirmed public school visits during 2025 spring semester.

Public Service

- Dr. Dan Ervin publishes regularly on energy policies at Real Clear Energy
- Dr. Shine Lei serves Council on Education member on the CFP Board
- Dr. Ani Mathers serves as Vice Chair of the Investment committee, Community Foundation of the Eastern Shore. Also, volunteers on the finance committee of St. Alban's Episcopal Church
- Dr. Leonard Arvi was inducted as Board member of the Shore Hatchery competition. A new FINA 338 Special Topics: "Angel Investing" course is being taught in spring of 2025.
- Dr. Leonard serves a board member on the Junior Achievement of the Eastern Shore (JAES) – Wicomico county and on the finance committee of JAES. Also, founding board member of new non-profit Blending Cultures Inc.
- Dr. Leonard Arvi served as one of four community members from Wicomico county in the Wicomico County Public School [redistricting committee](#).

Guest speakers in different FINA courses and FMA during fall of 2024

Robert Jeter, Vice President & Financial Advisor at INFOCUS Financial Advisors (FINA alum 2012)	Jason Nickerson, President & Chief Operating Officer at John G. Ullman & Associates (FINA alum 1997)
Mrs. Brenda Galgano CFO, Perdue Farms	Mr. Matt Cohen, co-founder, SIMPLi (FINA alum 2012)
Mr. Michael Sise and Mr. Zachary King of Comprehensive Financial Solutions	Miss. Abigail Boltz, Virginia Spaceport Authority (FINA alum 2021)
Mr. Noah Pielert, Constellation Energy natural gas trader (FINA alum 2006)	Mr. Luke Smith, Vice President (FINA alum 2017) & Mrs. Kimberly Magaha, Managing Director (FINA alum 2003) of WealthSpire
Mr. Wayne Judkins, Goldman Sachs alum, donor (FINA alum 1988)	Mr. Wesley Cox, Senior Advisor, SVN-Miller Commercial Real Estate (FINA alum 2002)
Mr. Christopher Shaffer, Exec Dir, family office	Mr. Aaron Wall, founder & partner, Fidelis Capital (FINA alum 2017)
Ms. Kathy Talbot, Tidal Health	Mr. Rich McGhee, Cognizant alum, investor, donor
Mr. Bret Davis, founder Davis Strategic (2013 MGMT alum)	Mr. Nick Marsch, founder Apex Storage Investments (FINA alum 2019)
Mr. Eric DeStefano, senior analyst / underwriter, Newmark (FINA alum 2014)	Mr. Dylan Reznick, advisor, SVN Miller Commercial Real Estate

Scholarship

- Eksi, A. (Discussant), Annual Conference on Pacific Basin Finance, Economics, Accounting, and Management, "The Effect of Award-winning CEOs on Innovation Investment (by Wen-Ju Liao, Ming-Chang Cheng, Hao-Chang Sung, and Saihong Xiao)," Piscataway, NJ. (August 2024).

- Eksi, A. (Author & Presenter), Roy, S. (Author), Annual Conference on Pacific Basin Finance, Economics, Accounting, and Management, "Volatility Expectations and Corporate Investment," Piscataway, NJ. (August 2024).
- Dr. Asli Eksi, Dr. Shine Lei, Dr. Ani Mathers, Dr. Herman Manakyan and Dr. Leonard Arvi serve as reviewers in multiple finance journals.