

## **Dr. Jennifer L. Lehman**

Western Carolina University  
Accounting, Finance, Information Systems, and Business Law  
Email: jlehman@email.wcu.edu

### **Education**

Ph D, Texas Tech University, 2018.

Major: Personal Financial Planning

Dissertation Title: Three Essays on Special Donation Types

JD, University of North Carolina at Chapel Hill, 1996.

Major: Law

MPA, University of North Carolina at Chapel Hill, 1996.

Major: Economics

Dissertation Title: Cost-Benefit Analysis of the Chapel Hill School System's Recycling and Waste Management Program

BS, Texas Christian University, 1992.

Major: Political Science

Supporting Areas of Emphasis: Philosophy, Radio-Television-Film

### **Academic, Government, Military, and Professional Positions**

#### **Academic**

Assistant Professor of Financial Planning, George Fox University. (August 2019 - Present).

Adjunct Professor of Estate Planning, Western Carolina University. (August 2018 - Present).

Estate Planning Adjunct Instructor, College for Financial Planning. (January 2018 - Present).

Visiting Assistant Professor, University of Utah. (July 2018 - June 2019).

Graduate Part-Time Instructor, Texas Tech University. (August 2014 - August 2018).

### **TEACHING**

#### **Teaching Experience**

##### **Western Carolina University**

FIN 496, Estate and Trust Planning, 5 courses.

LAW 496, Estate and Trust Planning, 5 courses.

### **RESEARCH**

#### **Published Intellectual Contributions**

##### **Journal Articles**

Lehman, J., & James, Russell N., III (2019). Charitable bequest importance among donors to different types of charities. *International Journal of Nonprofit and Voluntary Sector Marketing*.

Lehman, J., & Russell, J. (2018). The charitable bequest gap among African-Americans: Exploring charitable, religious, and family estate planning attitudes. *Journal of Personal Finance*, 17(1).

Lehman, J. (2018). Using Family Education as a Tool for Raising Ethical and Financially Responsible Children. *Journal of the Texas Tech University Ethics Center*, 2(1).

## **Presentations Given**

Lehman, J. (Presenter & Author), Academy for Financial Services Annual Conference, "Work Life Balance and Burnout Among Women in Financial Planning," Minneapolis, MN. (October 2019).

Lehman, J. (Presenter & Author), Academy for Financial Services Annual Conference, "Charitable Estate Planning among Donors to Different Types of Charities," Chicago, IL. (October 2018).

Lehman, J. (Presenter & Author), Salt Lake Community College Finance Symposium, "What is it Really Like to be a Financial Planner," Salt Lake City, UT. (October 2018).

Lehman, J. (Presenter & Author), Southwest Finance Association Conference, "Charitable Estate Planning among Donors to Different Types of Charities," Albuquerque, NM. (March 2018).

Lehman, J. (Presenter & Author), 2018 CFP® Board Academic Research Colloquium, "Charitable, Religious, and Family Estate Planning Attitudes among African Americans," Arlington, VA. (February 2018).

Lehman, J. (Presenter & Author), 2017 Association for Financial Counseling & Planning Education Annual Conference, "Charitable Bequest Attitudes among Minorities, and Implications for Financial Planners," San Diego, CA. (November 2017).

Lehman, J. (Presenter & Author), 2017 Academy of Financial Services Annual Conference, "Diversity Issues in Charitable Estate Planning," Nashville, TN. (October 2017).

Lehman, J. (Presenter & Author), 2017 Financial Management Association Doctoral Symposium, "Diversity Issues in Charitable Estate Planning," Boston, MA. (October 2017).

Lehman, J. (Presenter & Author), 2017 American Council on Consumer Interests Annual Conference, "Consumer Attitudes Regarding End of Life Charitable Planning," Albuquerque, NM. (April 2017).

## **SERVICE**

### **University Service**

Faculty Sponsor, George Fox University Ping Pong Club. (August 2019 - Present).

Faculty Sponsor, University of Utah Future Financial Planners Association. (August 2018 - July 2019).

### **Professional Service**

Reviewer, Oxford University Press. (2019).

Reviewer, Journal of Consumer Affairs. (2018).