Teaching Philosophy

I am deeply passionate about teaching investment-related concepts. I am a firm believer that instructional passion helps the content come alive. It is my hope and desire that my excitement for course material creates a heightened interest level among my students. My teaching goals are to encourage students to be curious learners, to provide an atmosphere of experiential learning, and to stimulate critical thinking. My teaching efforts have been directly benefited by my research, which has revolved around topics relevant to the courses that I teach.

My teaching philosophy has evolved over time as a result of various books[1] on learning theory, seminars offered by Penn State Behrend, and personal experience. I use lectures to introduce new information and then use both in-class and out-of-class experiential learning exercises to foster an environment of discovery-based learning. As students apply classroom learning in a way that replicates real life, their interest levels and self-motivation increase more rapidly. I routinely make an effort to work with students one-on-one when they express curiosity on a concept that is related to my expertise even when it is not directly covered in my classes.

Student learning is deeper and richer when they get their hands dirty by applying concepts discussed in class to real-world data. Examples of this philosophy include deploying stock trading simulations, conducting financial ratio analysis using SEC filings, calculating options strategies using student-selected companies, and forming retirement planning projections using software that is actually used in the industry. I have also brokered opportunities for students to use software (usually pro bono) that they would use on the job. Examples include YCharts and Riskalyze for the stock simulations and MoneyGuidePro in my Retirement Planning class. These are all resume builders for students. Additionally, I include guest speakers in my Retirement Planning class to show students different sides of the industry. Beginning fall 2021, we are also doing a case study in coordination with a major financial planning firm in Pittsburgh in an effort to provide students with an Open Lab experience.

Penn State has provided me with the opportunity to teaching both residential and online courses. I routinely bring lessons learned from one sphere to benefit the other. In my online classes, I have a feedback mechanism where students can tell me their *muddiest point* from a lesson. I use this feedback to improve both the online and residential content presentations. In addition, I have found asynchronous discussions in my online courses to be a good method to encourage critical thinking and reflection on targeted course-related topics. They also help students practice professional communication skills. Several students have commented on how valuable it has been for them to learn from their peer's experiences and to process course content in a more personal manner. Since this was such a success in my online classes, I am now using the same tool in my residential courses as well. I am also conducting research on student's self-reported value derived from the discussion forums in cooperation with Dr. Jim Fairbank. Finally, I believe that I should be in a state of continuous improvement to both set an example for my students and to benefit them directly at the same time. I make an explicit effort to attend workshops, take online training, and read books that will help me improve in both pedagogical and practical skills.

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[1] My two favorites are "How Learning Works" by Ambrose, Bridges, DiPietro, Lovett, & Norman, and "Dynamic Lecturing" by Harrington & Zakrajsek