

JEFFREY A. MANZI, Ph.D., CFA

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ACADEMIC PREPARATION

KENT STATE UNIVERSITY, Kent, Ohio
Ph.D., Finance/Operations Research, 1993

THE UNIVERSITY OF AKRON, Akron, Ohio
M.B.A., Finance, 1987

THE OHIO STATE UNIVERSITY, Columbus, Ohio
B.S., Engineering, 1981

KAPLAN UNIVERSITY, Online
M.S., Information Technology, 2013

PROFESSIONAL EXPERIENCE

KAPLAN HIGHER EDUCATION GROUP, Fort Lauderdale, Florida
Interim President, Mount Washington College, 2013
Vice President, Online Programs and Curriculum Innovation, Mount Washington College, 2013
Dean, School of Professional Education and Information Technology, 2013

KAPLAN PROFESSIONAL EDUCATION, La Crosse, Wisconsin
Vice President, Financial Education Programs, 2008-2013

KAPLAN|SCHWESER, La Crosse, Wisconsin
Consultant, CFA Product Development, 2004-2008
Vice President, CFA Programs, 2003-2004
Consultant, CFA Product Development, 2000-2003

FLORIDA INSTITUTE OF TECHNOLOGY, Melbourne, Florida
Professor of Finance, 2006-2008
Program Chair - Online Business Administration, 2007-2008

FLORIDA GULF COAST UNIVERSITY, Fort Myers, Florida
Visiting Associate Professor of Finance, 2002-2003

BIRMINGHAM-SOUTHERN COLLEGE, Birmingham, Alabama
Associate Professor of Finance, 2000-2001

OHIO UNIVERSITY, Athens, Ohio
Associate Professor of Finance, 1997-2000
Assistant Professor of Finance, 1991-1997

KENT STATE UNIVERSITY, Kent, Ohio
Adjunct Professor of Finance, 1988-1991

BABCOCK AND WILCOX COMPANY, NUCLEAR DIVISION, Barberton, Ohio
Plant Manager, 1987-1988
Engineering Manager, 1985-1987
Engineer, 1983-1985

ACF INDUSTRIES, INCORPORATED, AMCAR DIVISION, Huntington, West Virginia
Engineer, 1981-1982

TEACHING

Areas of Interest: Security Analysis, Portfolio Management, Investments, Business Statistics, Quantitative Analysis, Derivatives

Undergraduate Courses Taught: Managerial Finance, Investments, Portfolio Management, Financial Statement Analysis, Financial Markets and Institutions, Financial Policy, Security Analysis, Statistics, CFA Exam Preparation, Business Practicum

MBA Courses Taught: Investments, Corporate Finance, Portfolio Management, Case Studies in Finance, Financial Markets and Institutions

CFA Exam Preparation Courses Taught: Markets and Institutions (Level I), Corporate Finance (Level I); Financial Statements Analysis (Level I); Capital Market Theory (Level I); Fixed Income Investment Management (Level III); Equity Investment Management ((Level III); Risk Management (Level III); Global Portfolio Management (Level III); Performance Presentation Standards (Level III); Asset Valuation (Levels I and III); Quantitative Methods (Levels I and III); Economics (Levels I and III); Ethical and Professional Standards (Levels I and III)

Teaching Highlights: Taught undergraduate, MBA, and EMBA finance courses at Institute Teknologi MARA, Shah Alam, Malaysia. Developed and taught self-paced investments course specifically designed to prepare students for Series VII Securities Exam. Consistently recognized as outstanding by finance department chairs, students, and departmental colleagues.

PUBLICATIONS

Manzi, Jeffrey, Rayome, David (2014). "The Effectiveness of Mastery Learning in Business Education," *Review of Business Research*, 14(1) Fall, 2014.

Manzi, J. and L. Bean (2008). "A Self-Paced Approach to Teaching Finance," *The Journal of Management and Engineering Integration (JMEI)*, 1(1), Summer 2008.

Manzi, Jeffrey A. (1997). Malaysian Economy: Past and Present. *International Business Practices: Contemporary Readings*, Academy of Business Administration.

Manzi, Jeffrey A. (1997). Malaysian Banking and the Financial System: Historical and New Developments. *International Business Practices: Contemporary Readings*, Academy of Business Administration.

Manzi, Jeffrey A. and Richard J. Curcio (1997). The Effects of Regulatory Change on Pension Funding Determinants. *Managerial Finance*, Vol. 23, no. 8; pp. 30-47.

Manzi, Jeffrey A., Rajindar K. Koshal, Manjulika Koshal, and Azmi D. Mikhail (1996). Malaysian and Singapore Stock Markets: Are They Interdependent? *Global Business Trends: Contemporary Readings*, Academy of Business Administration.

Dissertation

Manzi, Jeffrey A. (May, 1993). *The Effects of the Tax Reform Act of 1986, the Single Employer Pension Plan Amendment Act of 1986, and the Pension Protection Act of 1987 on Corporate Pension Funding Policy*. Ph.D. Dissertation, Kent State University.

Publications in Conference Proceedings

Bean, L. and J. Manzi (March 2008). "A Model for Audit Brainstorming: The Search for Material Misstatements and Fraud," *International Conference on Industry, Engineering, and Management Systems Conference Proceedings*, Cocoa Beach, FL.

Manzi, Jeffrey A. and George F. Klersey (March, 2001). Series VII Preparation: A Personalized System of Instruction Approach. *Proceedings of The 2001 International Applied Business Research Conference*, Cancun, Mexico.

Manzi, Jeffrey A. and George F. Klersey (March, 2001). The Keller Plan Alternative for Business Education. *Proceedings of The 2001 International Business Education and Technology Conference*, Cancun, Mexico.

Manzi, Jeffrey A. (November, 1999). Teaching Investments Using a Personalized System of Instruction. *Proceedings of the Academy of Business Disciplines 1999 National Conference*, Fort Myers, FL.

Manzi, Jeffrey A. and Azmi D. Mikhail (April, 1994). Risk Return Behavior of Emerging Stock Markets: Implications for Global, Regional, and International Portfolio Management. *Proceedings of the First Annual Conference on Global Financial Issues*, Monterey, CA.

Pedagogical Publications

Manzi, Jeffrey A. (1997). Test Bank to accompany Reilly, Frank K. and Keith C. Brown, *Investments and Portfolio Management*, (5th ed.). New York: Dryden Press.

Manzi, Jeffrey A. (1997). PowerPoint® Presentation Software and Lecture Notes to accompany Reilly, Frank K. and Keith C. Brown, *Investments and Portfolio Management*, (5th ed.). New York: Dryden Press.

Manzi, Jeffrey A. and J. Medewitz-Diamond (1995). Study Guide to accompany Reilly, Frank K. and Keith C. Brown, *Investments*, (4th ed.). New York: Dryden Press.

PRESENTATIONS

Papers Presented at Academic Conferences

- Manzi, Jeffrey A. (presenter) and George F. Klersey (March 2001). The Keller Plan Alternative for Business Education. The 2001 International Business Education and Technology Conference, Cancun, Mexico.
- Manzi, Jeffrey A. (presenter) and George F. Klersey (March 2001). Series VII Preparation: A Personalized System of Instruction Approach. The 2001 International Applied Business Research Conference, Cancun, Mexico.
- Manzi, Jeffrey A. (November 1999). Teaching Investments Using a Personalized System of Instruction. Academy of Business Disciplines 1999 National Conference, Ft. Myers, FL.
- Manzi, Jeffrey A. (presenter) and G. Kaye Rakes (July 1997). Improvement in Power Company Securities: Positioning for International Investments. Institute of Business Administration and Technology International Conference, London, England.
- Manzi, Jeffrey A. (presenter), Kah Hwa Ng, Ming-Hau Liu, and Nanda Rangan (July 1996). Conduct of Commercial Banks. Academy of Business Administration 1996 International Conference, Athens, Greece.
- Manzi, Jeffrey A. (July 1996). Malaysian Banking and the Financial System: Historical and New Developments. Academy of Business Administration 1996 International Conference, Athens, Greece.
- Manzi, Jeffrey A. (July 1996). Malaysian Economy: Past and Present. Academy of Business Administration 1996 International Conference, Athens, Greece.
- Manzi, Jeffrey A. (July 1996). Team Teaching the Core Curriculum. Panel session with James Perotti, Valerie Perotti, and Lucian Spataro. Academy of Business Administration 1996 International Conference, Athens, Greece.
- Manzi, Jeffrey A. (presenter) and Rajindar K. Koshal, Manjulika Koshal, and Azmi D. Mikhail. (December, 1995). Malaysian and Singapore Stock Markets: Are They Interdependent? Academy of Business Administration 1995 Global Trends Conference, Aruba.
- Manzi, Jeffrey A. (presenter) and Azmi D. Mikhail. (April, 1995). Portfolio Performance in Emerging Markets: Some Global, Regional, and National Comparisons. Eastern Finance Association Annual Meeting, Hilton Head, SC.
- Manzi, Jeffrey A. (presenter) and Azmi D. Mikhail. (April 1994). Risk Return Behavior of Emerging Stock Markets: Implications for Global, Regional, and International Portfolio Management. Global Finance Association Annual Meeting, Monterey, CA.
- Manzi, Jeffrey A. (April 1994). The Effects of Post-1995 Pension Legislation on the Funding Policy of Overfunded and Underfunded Pension Funding Policy. Eastern Finance Association Annual Meeting, Boston, MA.
- Manzi, Jeffrey A. (presenter) and Richard J. Curcio. (March 1994). The Effects of Post-1995 Pension Legislation on the Determinants of Corporate Pension Funding Policy. Midwest Finance Association Annual Meeting, Chicago, IL.
- Manzi, Jeffrey A. (presenter) and Richard J. Curcio. (November, 1993). The Effects of the Tax Reform Act of 1986, the Single Employer Pension Plan Amendment Act of 1986, and the Pension Protection Act of 1987 on Corporate Pension Funding Policy. Southern Finance Association Annual Meeting, New Orleans, LA.

Professional Seminars

- Manzi, Jeffrey A. (Spring 2003). Schweser Study Program 3-Day Seminar for CFA Level III exam preparation, Boston, MA, San Francisco, CA, Washington, DC, Philadelphia, PA, and Miami, FL.

PROFESSIONAL ACTIVITIES

Participation at Professional Meetings

- Session Chair, International Academy of Business and Economics, Las Vegas, NV, 2014.
- Discussant, International Academy of Business and Economics, Las Vegas, NV, 2014.
- Registration Committee Member, Southern Finance Association Annual Meeting, Key West, Florida, 2003.
- Session Chair, International Applied Business Research Conference, Cancun, Mexico, 2001.
- Session Chair and Discussant, Southern Finance Association Annual Meeting, Key West, Florida, 1999.
- Track Chair, Reviewer, Session Chair, and Discussant (two papers), Institute of Business Administration and Technology, International Conference, London, England, 1997.
- Track Chair, Reviewer, Session Chair, and Discussant (two papers), Academy of Business Administration International Conference, Athens, Greece, 1996.
- Reviewer, Session Chair, and Discussant. Academy of Business Administration Global Trends Conference, Aruba, 1995.
- Reviewer, Academy of Business Administration National Meeting, Reno, Nevada, 1995.
- Discussant, Eastern Finance Association Annual Meeting, Hilton Head, South Carolina, 1995.
- Session Chair and Discussant, Eastern Finance Association Annual Meeting, Boston, Massachusetts, 1994.
- Session Chair, Symposium on International Business in Competitive, Shrinking World, Athens, Ohio, 1993.

Professional Achievements

- CFA Charterholder
- Licensed Professional Engineer

Other Professional Activities

Reviewer. Bodie, Zvi, Alex Kane, and Alan J. Marcus (2001). *Essentials of Investments*, 5th ed. New York: Irwin Publishing Inc.
Reviewer. Corrado, Charles and Brad Jordan (1999). *Investments: Valuation and Management*. New York: McGraw-Hill Companies, Inc.
Reviewer. Bodie, Zvi, Alex Kane, and Alan J. Marcus (1996). *Essentials of Investments*, 3rd ed. New York: Irwin Publishing Inc.
Reviewer. Reilly, Frank K. and Edgar A. Norton (1995). *Investments*, 4th ed. New York: Dryden Press.
Reviewer. Bodie, Zvi, Alex Kane, and Alan J. Marcus (1994). *Essentials of Investments*, 2nd ed. New York: Irwin Publishing, Inc.
Reviewer. Hearth, Douglas and Janis K. Zaima (1992). *Contemporary Investment Analysis and Management*. New York: Dryden Press.
Workshop participant. International Conference on Problem-Based Learning in Undergraduate and Professional Education, Birmingham, Alabama, October 29-31, 2000.
Developed proposal to train employees of Employee Provident Fund, Malaysia, 1996.
Developed program to price vehicle leases for Ohio University's motor pool, 1996.
Attended Financial Futures for Educators Workshop, CBOE, Chicago, Illinois, 1995; Financial Futures Workshop, 1993.
Expert Witness for Security Valuation. Mollica, Gall, Sloan & Sillery Co., December, 1993.

Professional Memberships

Financial Management Association
Chartered Financial Analysts Institute
Ohio Society of Professional Engineers and Surveyors
Securities and Insurance Licensing Association
Society of Insurance Trainers and Educators
American Society for Training and Development

Awards/Honors

Pioneer Award, Institute of Business Administration and Technology, 1997 International Conference, London, England, 1997
International Service Award, Academy of Business Administration, International Conference, Athens, Greece, 1996
Faculty and Staff Book Authors Recognition, Friends of the Libraries of Ohio University, National Library Week, 1995

SERVICE

University, College, and Department Committees

Undergraduate Curriculum Committee, 2007-2014
Faculty Senate, 2002-2003
PMBA Admissions Committee, 2000-2001
Finance Department representative, MBA Curriculum Committee, 1996-1998
Member, College of Business Dean Search Committee, 1996-1997
Chairman, College of Business, Faculty Composition and Development Continuous Improvement Team, 1996-1997
Member, College of Business, Sexual Harassment Committee, 1995-1997
Chair, Finance Department Assessment Committee, 1995-2000
Member, College of Business, Faculty Composition and Development Continuous Improvement Team, 1995-1996
Chairman, Finance Department Search Committee for Bank One Endowed Professor, 1994-1996
Chairman, Finance Department Faculty Search Committee, 1993-1994
Co-chair, College of Business Administration Relocation Task Force, 1993
Member, College of Business Administration Research and Development Committee, 1991-1994

Professional Committees

NAPLES FINANCIAL ANALYST SOCIETY, Naples, Florida, **Technology Committee Chair**, 2002-2003; **Scholarship Committee Chair**, 2002-2003

Community Service

LA CROSSE COUNTY HABITAT FOR HUMANITY, La Crosse, Wisconsin, **Board Member**, 2003-2004
JEFFERSON COUNTY HABITAT FOR HUMANITY, Birmingham, Alabama, **Member, Finance Committee**, 2000-2001
ATHENS COUNTY HABITAT FOR HUMANITY, Athens, Ohio, **Treasurer**, 1999-2000; **Chair, Finance Committee**, 1999-2000; **Member, Church Relations Committee**, 1998-2000
APPALACHIAN DEVELOPMENT FEDERAL CREDIT UNION, Athens, Ohio, **Secretary, Board of Directors**, 1995-2000; **Chair, Credit Committee**, 1995-2000; **Chair, Investment Committee**, 1995-2000
A.M. ROTARY CLUB, Athens, Ohio, **Charter Member**, 1997-2000
SOUTHEAST OHIO REGIONAL JAIL, Nelsonville, Ohio, **Facilitator, Anger Management for Men**, 1999
ATHENS WOMEN'S INVESTMENT CLUB, Athens, Ohio, **Advisor**, 1998