KAPLAN UNIVERSITY

Faculty

Keith R. Fevurly
CFP®*, M.B.A., J.D., LL.M.

Keith Fevurly, Kaplan University financial planning education executive director, has been involved in the education of personal financial planners for over 15 years. He has responsibility for development and administration of curriculum. He has experience as chief operating officer of a private business as well as several years as an estate tax attorney with the Internal Revenue Service. His articles have appeared in *Personal Financial Planning, Journal of Accountancy, Broker World, Best's Review,* and *Estate Planning.*

Jeffrey B. Mershon
CFP®, CPA, M.B.A.

Jeff Mershon, Kaplan University financial planning education associate director, has been involved in the education and regulation of personal financial planners for over 10 years and has provided consulting services to many organizations within the profession. Mr. Mershon served as assistant executive director and director of postcertification at the Certified Financial Planner Board of Standards Inc. As a CPA, he has served as a tax accountant, controller, treasurer, partner, and sole proprietor for various firms.

J. Alan Bennett
CFP®, M.B.A.

J. Alan Bennett, instructor for Kaplan University, is a CERTIFIED FINANCIAL PLANNER™ professional and has over 12 years of experience working for Ford Motor Company as a manufacturing engineer and a powertrain planner. He has also worked for H&R Block as a tax preparer and currently serves as a faculty member at the University of Toledo in Toledo, Ohio, in the department of finance. He has experience with both conventional and online learning formats. Mr. Bennett holds a B.S. degree in electrical engineering and a B.S. degree in engineering and public policy from Washington University in St. Louis, Missouri, as well as an M.B.A. from the University of Michigan in Ann Arbor, Michigan.

Mandell S. Winter Jr.
CLU, ChFC, M.B.A.

Mandell S. Winter Jr., instructor for Kaplan University, has over 25 years of experience in the financial services industry. Most of those years were spent working directly with clients. He spent six years on the faculty of the College for Financial Planning and concurrently taught at Metropolitan State College of Denver. His field and teaching experience encompasses financial planning, insurance planning, employee benefits, retirement, and estate and business planning. Mr. Winter has authored many articles that have been published nationally in financial services publications, and has been a guest speaker for various organizations. He has an M.B.A. from Golden Gate University, a B.S. in business from the University of Colorado, Boulder, as well as both a CLU and a ChFC from The American College.

Michael L. Wilson
CFP®, M.B.A.

Michael L. Wilson, instructor for Kaplan University, is also the owner of Integrity Financial Planning located in Orland, Indiana. Prior to Integrity, he worked over two years as a faculty member at the College for Financial Planning in Denver, training other financial advisors. Mr. Wilson has extensive experience in the mutual fund industry, having worked 10 years with Fidelity Investments and Invesco Mutual Funds. He has an M.B.A. in finance from Baylor University, and he is a CERTIFIED FINANCIAL PLANNER™ professional. Mr. Wilson is also a Chartered Mutual Fund Counselor (CMFC) and Certified Retirement Counselor (CRC).

Bart Brewer
CFP®, CFA®, EA, CLU, ChFC, M.B.A.

Bart Brewer, instructor for Kaplan University, is currently an independent business and financial planning consultant in Santa Monica, California. He is also an instructor for Dearborn Financial Services, teaching securities licensing classes. Mr. Brewer has been the vice president of U.S. government trading for ScotiaMcleod (USA) Inc. in New York as well as the vice president, money market, for the same firm. In addition, he has been a financial consultant for the Atlantic Richfield Company in Los Angeles. He is an Enrolled Agent with the Internal Revenue Service and is a CERTIFIED FINANCIAL PLANNER™ professional. He also holds the Chartered Financial Analyst designation. He has an M.B.A. from the Amos Tuck School of Business at Dartmouth College.

Carla Gordon
CFP®, CSA, MSFS

Carla Gordon, instructor for Kaplan University, is currently a financial planner and educator in Chicago. She has authored numerous publications for the American Institute of Certified Public Accountants (AICPA) as well as Fidelity Investments and other financial services firms. Ms. Gordon is the author of *Retirement Planning for Insurance Professionals* published by Dearborn Financial Publishing. She is a securities and insurance instructor for Dearborn Financial Services and holds a Master of Science in financial planning from the College for Financial Planning in Denver, Colorado. She is a CERTIFIED FINANCIAL PLANNER™ professional and a Certified Senior Advisor.

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Board of Advisors

Peter Aherns

Peter Ahrens is first vice president and head of North American financial planning for HSBC North American Advisory. He joined HSBC in September of 1997 and is responsible for the development and implementation of consultative financial planning process and corresponding tools, such as the appropriate financial planning applications and training. Before joining HSBC, Mr. Ahrens was a financial advisor with American Express Financial Advisors. During his six year tenure at American Express, he became a member of their prestigious Advanced Advisors Group and served on the firms' Quality Advice Peer Review Committee.

Bill E. Carter
CFP®, CLU, ChFC

Bill Carter, president of Carter Financial Management, has served as chairman of the board and president of the IAFP. He is past president and past chairman of the Board of Governors of the Certified Financial Planner Board of Standards Inc. and also is past chair of the International CFP Council. *Worth* magazine recently named Mr. Carter one of the Top 250 Financial Planners. Frequently quoted in such publications as *The New York Times*, *Money* magazine, *USA Today*, *The Wall Street Journal*, and *The Dallas Morning News*, he is a pioneer of the financial planning profession.

Scott M. Kahan
CFP®

Scott Kahan, president of Financial Asset Management Corporation, teaches collegiate financial planning courses. He has received an award for teaching excellence in financial management, and has provided corporate training for banks and financial planning seminars for employees of corporations and professional associations. Mr. Kahan often appears on CNBC and CNN to discuss investment and financial planning issues. He is quoted in local and national publications and has contributed to the book *Inc. Yourself*. He serves on the FPA's National Board of Directors, is past president and chair of the Metro New York ICFP Society, and served on the national board of the ICFP.

Tim Kochis
CFP®, M.B.A., J.D.

Tim Kochis, president of Kochis, Fitz, Tracy, Fitzhugh & Gott, Inc., has served as national director of personal financial planning for both Deloitte & Touche and for Bank of America. He is past chairman of the International CFP Council, past chair of the CFP Board of Standards, Inc., and past chairman of the CFP Board of Examiners. Mr. Kochis has been named Financial Planner of the Year by the San Francisco chapter of IAFP. Listed in *Worth* magazine's Best Financial Advisers each year since the list was initially published, he is frequently quoted in *The Wall Street Journal* and *The New York Times*. He is on the Advisory Board of the *CCH Financial* and *Estate Planning Reporter*.

Joan H. Peurifoy
CFP®

Joan Peurifoy, regional director for Financial Network Investment Corporation and president of FN Insurance Services of Texas, Inc., has served as past chairwoman of the Ethics Committee of National IAFP. Ms. Peurifoy has had innumerable speaking engagements over the past 22 years. In addition, she is a contributor of articles to numerous financial planning publications. She enjoys teaching college-level financial planning courses. She also works with employee financial training programs at large Dallas–area corporations.

Kenneth J. Zahn
CFP®

Kenneth Zahn, Certified Financial Planner™ professional and educator, has been active doing fee-based planning as well as handling a variety of insurance and investment products for individuals, small businesses, and professionals for over two decades. Mr. Zahn has a 16-year history of instructing all the CFP Board-Registered Program courses for various organizations. He was one of the original founding officers of the Tampa Bay Society of the Institute of Certified Financial Planners. He has been developing continuing education courses for insurance agents and financial planners since 1990 and has been very successful with his CFP® Certification Examination test preparation business. He has also been an NASD arbitrator and an expert witness for both the plaintiff and defendant in financial planning cases.

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