

# JOSEPH D. FARIZO

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## ACADEMIC APPOINTMENTS

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<b>University of Richmond</b> – Robins School of Business (RSB) <i>Assistant Professor of Finance</i>	2020-Present
<i>RSB Outstanding Research Publication Award</i>	2023
<i>RSB Teaching Award</i>	2023
<i>RSB Scholarly Activity Award</i>	2023
<i>RSB Class of 2022 Faculty of the Year Award</i>	2022
<i>RSB Outstanding Research Publication Award (sole-authored work)</i>	2022

## EDUCATION

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<b>University of Kentucky</b> – Gatton College of Business and Economics <i>Ph.D., Finance &amp; Quantitative Methods</i>	2020
<b>Louisiana State University</b> – E.J. Ourso College of Business <i>M.S., Finance</i>	2013
<i>B.S., Finance</i>	2011

## SCHOLARLY WORKS

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- [1] **(Black)Rock the Vote: Index Funds and Opposition to Management** [\(LINK\)](#)  
*Journal of Corporate Finance* (2022)
- [2] **The Low-Risk Effect in Equities: Evidence from Industry Data in an Earlier Time** [\(LINK\)](#)  
With C. Mitchell Conover and Andrew Szakmary.  
*Financial Analysts Journal* (2023)
- [3] **Endowment Asset Allocations: Insights and Strategies** [\(LINK\)](#)  
With Tom Arnold, John Earl, and David North.  
*Journal of Asset Management*
- [4] **The Diversification Benefits from Foreign Real Estate: Evidence from 40 Years of Data** [\(LINK\)](#)  
With C. Mitchell Conover, H. Swint Friday, and David North.  
*Journal of Risk and Financial Management*
- [5] **Excel Templates for Illustrating TVM Calculations and a Financial Calculator with Associated Excel Functions** [\(LINK\)](#)  
With Maura Alexander and Tom Arnold.  
*Journal of Economics and Finance Education* (2022)
- [6] **Monte Carlo and Bootstrapping Carry Trade Simulations in Excel** [\(LINK\)](#)  
With Tom Arnold and Mitch Conover.  
*Forthcoming – Journal of Economics and Finance Education*

[7] **Where is the Intersection of Madison Avenue and Wall Street?** (LINK)  
With Will Gerken & Ge Wu.

[8] **Simplified Portfolio Optimization Using Cramer's Rule in Excel** (LINK)  
With Tom Arnold and Terry Nixon.  
*Under Review*

[9] **Misconduct and Fraud by Investment Managers** (LINK)  
With Stephen Dimmock & Will Gerken.  
*Corruption and Fraud in Financial Markets (2020)*

## CONFERENCES & PRESENTATIONS

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*Midwestern Finance Association (2023), University of South Florida (2023)\*, Boulder Summer Conference on Consumer Financial Decision Making (poster session, 2022), FINRA and NORC's Joint Access and Impact Conference: Gauging the Participation of Diverse Communities in the Capital Markets (2021)\*, CFP Board's Academic Research Colloquium (poster session, 2021), University of Kansas (2022)\*, University of Kentucky (2021)\*, Eastern Finance Association (2019), Financial Management Association (2019, 2022), Financial Management Association Doctoral Student Consortium (2019), University of Kentucky (2019), University of South Carolina (2019), The College of New Jersey (2019), Towson University (2019), Salisbury University (2019), University of Richmond (2019, 2022), The Citadel (2019), SEC DERA PhD Student Symposium (2018)*

\* indicates presentation by coauthor

## TEACHING

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### **University of Richmond- Robins School of Business**

- FIN 366: Investments 2020-Present
- FIN 360: Principles of Financial Management Spring 2023-Present
- FIN 468: Student Managed Investment Fund Spring 2024

### **University of Kentucky- Gatton College of Business and Economics**

- B&E 105: Technology for Business Solutions (online delivery – Excel) 2018-20
- Python for Finance (two-day workshop for MSF students) Spring 2019
- FIN 300: Introduction to Corporate Finance Summer 2018

## EXPERIENCE & SERVICE

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### **Experience**

Postlethwaite & Netterville, APAC (Business Valuation Consulting) 2014  
TWFG Insurance Services (Branch Owner & Agent) 2010-14  
Licensed Louisiana Property & Casualty/Life & Health Insurance Agent 2010-20

### **Service and Involvement**

University of Richmond, Student Managed Investment Fund Faculty Advisor 2021-Present  
University of Richmond, Delta Sigma Pi - Rho Omega Chapter Faculty Advisor 2022-Present  
University of Richmond, Scholars of Finance Faculty Advisor 2022-Present  
University of Richmond, Finance Department Hiring Committee 2021  
University of Richmond, Undergraduate Student's Honors Thesis Committee Member 2022-23

## ***Ad Hoc Reviewer***

*Journal of Corporate Finance*

*Corporate Governance: An International Review*

*Journal of Asset Management*

## **MEDIA & COMMENTARY**

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SEC Commissioner [Statement](#) ([Data Appendix](#)), Money Geek Blog ([auto insurance](#), [cost calculator](#), [beginning investing](#), [credit cards](#), [saving and investing](#), [motorcycle insurance](#)), Wallet Hub ([loans](#)), The Evidence-Based Investor [Blog](#), Suitable Advice Institute [Blog](#), Citywire [Blog](#), Value Edge Advisors [Blog](#), Expert Wealth Management [Blog](#), Betafolio [Blog](#), Rockwealth [News Room](#), Evestor [Market Commentary](#), National Affairs [Blog](#), Bloomberg (Matt Levine) [Money Stuff](#)

Forbes [Contributor](#)