Meghan McInnes, MS, AFC®, FFC®

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Education

2020	MS in Personal Financial Planning, Kansas State University
2020	Graduate Certificate in Financial Therapy, Kansas State University
2019	Graduate Certificate in Personal Financial Planning, Kansas State University
2011	BS in Business Administration; Emphasis in Management, University of Missouri-St. Louis

Fellowship

2013	Financial Investor Regulatory Authority (FINRA) Investor Education Foundation Fellow

Certifications

2016	Financial Fitness Coach (FFC®)
2016	Accredited Financial Counselor (AFC®)

Professional Membership

2015-Present	Association for Financial Counseling and Planning Education (AFCPE®)

Academic Experience

2022-Present	Director of the Center for Excellence in Financial Counseling, University of Missouri-St. Louis
2022-Present	Assistant Teaching Professor of Personal Finance, University of Missouri-St. Louis

Industry Experience

2021-2022 Senior Financial Planner, Plancorp

- Led virtual financial wellness appointments covering various topics to diverse groups
- Applied financial counseling and therapy tools to explore client goals and legacy wishes
- Strategized with teammates and clients on financial planning techniques to meet goals
- Provided fiduciary fee-only financial planning services to HNW and UHNW families
- Mentored new teammates, including interns, to learn and grow field knowledge and skills

2018-2021 Personal Financial Counselor, Zeiders Enterprises

- Coordinated financial readiness activities for all military units within Scott AFB region
- Executed 201 seminars & 1,893 one-on-one financial counseling sessions
- Partnered with family readiness, military units, and support agencies to build referrals
- Rehabilitated regional activities and outpaced previous client contact hours in first quarter

2015-2019 Financial Coach, Armed Forces Services Corporation

- Coordinated Consumer Financial Protection Bureau Financial Coaching Program in region
- Top producing coach with over 800 one-on-one coaching sessions through program lifecycle
- Highlighted as top coach for returning clients resulting in creation of program best practices
- Co-facilitated peer-to-peer virtual group for improved communications and support of team
- Mentored new coaches in their journey to obtain their AFC® and FFC® designations

2015-2018 Army Personal Financial Management Instructor, SNAP Incorporated

- Instructed eight-hour Personal Financial Management Course to AIT Soldiers
- Prepared Soldiers with financial readiness tools, knowledge, and skills for life
- Answered personal finance questions and referred Soldiers to appropriate resources
- Provided after-action reports detailing measurable results/ongoing actions to Army leaders

Involvement

2020-Present Mentor, AFCPE® MentorConnect Program
2019-Present Research and Training Symposium Proposal Reviewer, AFCPE®
2016-Present Scholarship/Fellowship Application Review, AFCPE®
2020-2021 Chair, AFCPE® Diversity, Equity, and Inclusion Task Force
2017-2020 Subcommittee Leader, AFCPE® Diversity and Inclusion Task Force
2017-2021 Inaugural Member, AFCPE® Diversity, Equity, and Inclusion Task Force
2017-2018 Member, AFCPE® Communications and Member Services Task Force
2016-2018 High School of Business Steering Committee Member, Ritenour High School
2014-2017 Financial Mentor, Purple Heart Homes

Professional Presentations

Coker, S. & McInnes, M. (2019, February). *Building Inclusion through Peer-to-Peer Support Groups* [Webinar]. AFCPE and FPA Connect, United States.

Watford, S., Coker, S., McInnes, M. Lass, C., & Baxter, B. (2018, November 14-16). *Building a Diverse and Inclusive Profession: Results from the AFCPE Diversity Task Force* [Conference presentation]. AFCPE 2018 Research and Training Symposium, Norfolk, VA, United States.

Gardner, M. (2016, November 15-16). *Time Management Tips & Tricks for Financial Coaches* [Conference presentation]. AFCPE 2016 Research and Training Pre-Symposium, Louisville, KY, United States.

Gardner, M. (2016, November 15-16). *Finding Success as a Financial Coach* [Conference presentation]. AFCPE 2016 Research and Training Pre-Symposium, Louisville, KY, United States.

Prepared Professional Discussions

2021 *Sharing Our Symposium Experiences & Takeaways Networking Chat*, AFCPE 2021 Research and Training Symposium, Virtual, United States.

2021 *Diversity, Equity, and Inclusion Networking Chat*, AFCPE 2021 Research and Training Symposium, Virtual, United States.

2020 *Sharing Our Symposium Experiences & Takeaways Networking Chat*, AFCPE 2020 Research and Training Symposium, Virtual, United States.

2020 *Diversity, Equity, and Inclusion Networking Chat*, AFCPE 2020 Research and Training Symposium, Virtual, United States.

2017 *Bridging the Gap Through Diversity: Building an Inclusive Financial Community*, AFCPE 2017 Research and Training Symposium, San Diego, CA, United States.

Professional Publications

Laschon, C. & McInnes, M. (2021, November). Celebrate Diversity and Serve: Have Empathy, Respect Priorities, Be an Ally. *AFCPE*. https://www.afcpe.org/news-and-publications/blog/immigrant-heritage-month/.

McInnes, M. (2021). Working with Vulnerable Communities during COVID-19 & Racial Injustice Session Recap. *The Standard Newsletter, Q1*. https://www.afcpe.org/news-and-publications/the-standard/1st-quarter-2021/working-with-vulnerable-communities-during-covid-19-racial-injustice-session-recap/.

Laschon, C. & McInnes, M. (2021). Diversity, Equity, & Inclusion (DEI) Networking Chat Recap. *The Standard Newsletter, Q1*. https://www.afcpe.org/news-and-publications/the-standard/1st-quarter-2021/diversity-equity-inclusion-dei-networking-chat-recap/.

Gardner, M. (2017, April 6). Providing the Tools for Success. *AFCPE*. https://www.afcpe.org/news-and-publications/blog/providing-the-tools-for-success/.

Gardner, M. (2017). Takeaways from the AFSC Financial Coaches Pre-Symposium. *The Standard Newsletter, Q1*. https://www.afcpe.org/news-and-publications/the-standard/2017-1/takeaways-from-the-afsc-financial-coaches-pre-symposium/.

Gardner, M. (2016, August 24). Free: A Financial Counselor's Favorite Price. *AFCPE*. https://www.afcpe.org/news-and-publications/blog/free-a-financial-counselors-favorite-price/.

Gardner, M. (2015). Book Review: The Automatic Millionaire by David Bach. *AFCPE*.

Gardner, M. (2015). Book Review: Women's Worth: Finding Your Financial Confidence by Eleanor Blayney. *AFCPE*.

Media Mentions & Highlights

2018	*Military Saves Week 2018 Annual Report*, Military Saves
2017	*2017 Annual Report*, Prosperity Connection
2017	*Anthony*, Prosperity Connection
2017	*Military Saves Week 2017 Annual Report*, Military Saves
2017	*Important Initiatives & Top Tips: How AFC® Professionals Are Celebrating #ASW17*, AFCPE
2016	*Military Saves Week 2016 Annual Report*, Military Saves
2015	*Military Saves Week 2015 Annual Report*, Military Saves

Consumer Publications

2021	*Retirement Planning Basics*, SaverLife
	Why You Need a Financial GPS, SaverLife
	Women Run the (Financial) World, SaverLife
	Make a Powerful Plan for Your Tax Refund & Stimulus Check, SaverLife
2017	*Financial Tip of the Month: Prepare Now for the Holidays*, SLCCU Employee Newsletter
	Seek a Financial Coach When…, Prosperity Connection
	Putting a Smile on Mom's Face Without Breaking the Bank, Prosperity Connection
	Ask the Expert: Best Ways to Use Your Tax Refund, SLCCU Focus Newsletter
	Financial Tip of the Month: Tips to Avoid Student Loan Default, SLCCU Employee Newsletter

	Take Action: Pledge to Save, Prosperity Connection
2016	*Financial Tip of the Month: Health & Wealth Resolutions*, SLCCU Employee Newsletter
	Homeownership Within Reach, Prosperity Connection
	Financial Tip of the Month: Find Motivation, SLCCU Employee Newsletter
	Car Buying Negotiations, Prosperity Connection
	Preparing to Purchase a Home, Military Saves
	Financial Education: A Military Family Success, MSAN
	Simple Ways to Save Automatically, Prosperity Connection
	Filling Your Child's Money Memory Bank, Prosperity Connection
	Saving: A Dedication to Yourself, Prosperity Connection
	When the Holiday Bill Comes, MSAN
	4 Small Changes for a Big Impact in 2016, Prosperity Connection
2015	*5 Cost Saving Tips to Help Ring in 2016*, MSAN
	5 Tips to Achieve Your Financial Dreams in 2016, Prosperity Connection
	Giving through Time, Talent, & Treasure, Prosperity Connection
	Some Pitfalls of Predatory Lending, Prosperity Connection
	Financial Tip of the Month: Managing Your Debts, SLCCU Employee Newsletter
	Removing the Mystery from Credit Reports, Prosperity Connection
	Financial Tip of the Month: Children & Money, SLCCU Employee Newsletter
	Know What You Owe, Military Saves
	Approaches to Becoming a Financial Fit Female, Prosperity Connection
	Considerations for Separating or Retiring from Military Service, Military Saves
	10 Benefits of Financial Coaching, Prosperity Connection
	MSRRA: Income Tax Help from Military Families, MSAN
	A Response to Military Families Carrying More Debt, MSAN
	Ask the Expert: Back to School Savings, SLCCU Focus Newsletter
	Financial Tip of the Month: Simple Steps for Auto Buying, SLCCU Employee Newsletter
	Savings Deposit Program for Deployed Troops, Military Saves
	Budgeting: How & Why, MSAN
2014	*Financial New Years Resolutions*, MSAN
	Debt Assistance through the Servicemember Civil Relief Act, MSAN
	Dig Your Way Out of Debt, Military Saves
	Save Now, Retire Comfortably, Military Saves
	Healthy Uses for Your 2014 Tax Refund, Military Saves

Honors & Awards

2020	Star Award, Zeiders Enterprises
2018	Setting the Standard Award (Group award to the CFPB Financial Coaching Program), AFCPE®
2018	Partner of the Year, Missouri Veterans Endeavor
2017	ROQSTAR of Excellence On-the-Spot Coin, Armed Forces Services Corporation
2015	ROQSTAR of Excellence On-the-Spot Coin, Armed Forces Services Corporation
2012	District Top 10 Bankers of February, US Bank
2012	Silver Shield Award, US Bank
2011	Pinnacle District Customer Service Award, US Bank