

Curriculum Vitae

William “Alan” McKnight, DBA, CFP®

Education

University of Florida

Doctor of Business Administration (Ph.D. Track) - Finance

College for Financial Planning

Certified Financial Planner™ Program

Kennesaw State University

Master of Business Administration – Finance

Southern Polytechnic College of Engineering and Engineering Technology

Bachelor of Mechanical Engineering Technology

Financial Planning and Wealth Management Experience

Mercer Advisors

December 2020 to Present

Senior Wealth Advisor

- Senior Wealth Advisor for a \$55 billion firm supporting the team’s Regional Vice Presidents and Managing Directors as a subject matter expert (SME) in the areas of investments, tax planning, pension planning, estate planning, insurance, retirement planning, and general financial planning.
- Analyze, draft, edit, deliver, and present comprehensive financial plans to clients.
- Analyze prospective clients’ investment portfolios and financial planning to support Regional Vice Presidents in introducing new clients to the firm.
- Manage client communications and follow-up with clients’ other advisors.

Kays Financial Advisory Corporation

January 1999 to December 2020

Principal and Senior Advisor

- Developed the financial planning division and in charge of client relationships and business management of a registered investment advisory firm.
- Helped develop and implement the firm’s comprehensive financial planning and wealth management process. Designed to navigate clients through the five major areas of investment planning, insurance planning, retirement planning, tax planning, and estate planning.
- Successfully cultivated and managed over two hundred client relationships for a firm generating \$6 million in annual gross revenues. Recruited and trained key support personnel in financial planning and account administration.
- Significantly contributed to the firm’s growth from \$55 million in assets under management to over \$800 million in assets under management by developing professional referral sources, client referrals, and actively holding educational financial workshops.

Certified Financial Planner Board of Standards

2016

Subject Matter Expert

- CFP Board Volunteer and Subject Matter Expert responsible for writing questions for the CFP® Certification Examination in the areas of Professional Conduct and Regulation, General Financial Planning Principles, Education Planning, Risk Management and Insurance Planning, Investment Planning, Tax Planning, and Retirement Savings and Income.

Education/Teaching Experience

University of Florida

July 2022 to Present

Lecturer – Finance (Part-time)

- Teach courses in the Wealth Management and Financial Planning Program. Primarily teach Estate and Tax Planning
- Faculty Advisor - Financial Planning Challenge 2023

University of Maryland Global Campus

May 2019 to Present

Adjunct Professor – Finance (Part-time)

- Teach online courses in the CFP Board Registered Program for students earning a Bachelor of Finance degree.
- Primarily teach the introductory course Fundamentals of Building Wealth, Financial Management, Investments, and Retirement and Estate Planning.

Southern New Hampshire University

November 2014 to Present

Adjunct Faculty – Finance (Part-time)

- Responsible for teaching online undergraduate level finance courses for adult learners in the College of Online and Continuing Education (COCE) and the CFP Board Registered Program.
- Courses taught include Principles of Finance, Corporate Finance, Financial Markets, Wealth Management, Advanced Personal Financial Planning, and the Finance Capstone.

Keller Graduate School of Management

October 1998 to March 2014

Visiting Professor – Finance (Part-time)

- Instructor responsible for teaching all onsite and online graduate-level finance courses within the business school.
- Courses taught included Personal Financial Planning, Securities Analysis, Options & Futures, Banking and Financial Institutions, Managerial Finance, Advanced Managerial Finance, Budgeting and Forecasting, and Mergers and Acquisitions.

Teaching Seminars Attended

Columbia University School of Professional Studies, New York, NY

Completed the CFP Board-Columbia University Financial Planning Teaching Seminar (2018)

- An experience-based program focusing on both financial planning content as well as basic instructional design, using learning objectives, student assessment, and ways of bringing experiential learning into the classroom or an online learning platform.

Research Interests

Dissertation: *Does the Market Fully Value Intangible Assets? Revisiting the Relationship Between Long-term Abnormal Stock Returns and Customer Satisfaction*

Research interests also include Stock Mispricing and Market Anomalies, Behavioral Finance/Economics, Marketing-Finance Interface, Investments, Securities Analysis, Asset Allocation, and Risk Management.

Licenses and Certifications

CERTIFIED FINANCIAL PLANNER™

Investment Adviser Representative FINRA Series 65

NASD/FINRA Series 6, 7, and 63 (Inactive)

Life, Accident, Health Insurance Agent and Counselor Licenses (Inactive)

Professional Associations

American Association of Family & Consumer Sciences (AAFCS)

CFA Institute

Financial Planning Association (FPA)

Georgia Society of CPAs (GSCPA)

Industry Awards and Achievements

List of Top Wealth Managers in Financial Planning by *Atlanta* magazine

Awarded the “Excellence in Teaching” award from the Keller Graduate School of Management

Nominee for the 2016 Advisors Recognizing Excellence Award nominee at Southern New Hampshire University

Nominee for the 2021 UMGC Stanley J. Drazek Teaching Excellence Award and the UMGC Teaching Recognition Award.

Academic Star Award 2022 UMGC – Awarded to faculty who demonstrated academic and professional achievements that have had a powerful impact in their program, classroom, or the lives of their students.

Outstanding Adjunct Faculty designation for Academic Year 2023-2024 University of Maryland Global Campus (UMGC).