

# Tom C. Nelson, PhD, CFP®

<b>Objective</b>	<p>Teaching and mentoring students of finance, particularly in corporate finance, financial planning, and investment/portfolio management.</p>
<b>Teaching Experience</b>	<ul style="list-style-type: none"> <li> <p>• 1999 to present      Leeds School of Business, University of Colorado      Boulder, CO  <b>Senior Instructor of Finance</b>  <b>Director, Testing and Assessment</b>  <b>Faculty Undergraduate Liaison for Finance (Student Advisor)</b></p> <p>Teach Introduction to Finance, Investments and Portfolio Management, and Applied Business Finance (senior case course) at both undergrad and graduate level at CU Business School.</p> </li> <li> <p>• 1999 to present      Metro State College, Univ of Phoenix      Denver, CO  <b>Instructor</b>  Teach the Investments course of the CFP certification program.</p> </li> <li> <p>• 1981-1983      National Registry of EMTs      Columbus, OH  <b>Regional Exam Coordinator</b>  Conducted national board certification for Paramedics in central USA</p> </li> <li> <p>• 1974-1978      Lutheran Medical Center      Denver, CO  <b>Program Director</b>  Coordinated Emergency Medical Technician (EMT) Training Programs  Coordinated training programs for Colorado Heart Association and American Red Cross</p> </li> </ul>
<b>Work Experience</b>	<ul style="list-style-type: none"> <li> <p>• 1995-present      Financial Planning      Superior, CO  <b>Registered Investment Advisor (RIA) (2008-present)</b>  Financial planning and consulting to private clients.  <b>Trustee, Wood Trusts (1995-present)</b>  Financial planning, asset management, and trust management for three private trusts with \$8 million under management</p> </li> <li> <p>• 1993-1999      American Medical Response      Denver, CO  <b>Group VP of Financial Operations (1997-1999)</b>  Chief financial director for 7 divisions in 15 states, \$250 million revenue, 4,000 employees, overseeing financial operations and budget; consolidated financial functions over 12 month period.  <b>Chief Financial Officer (1993-1997)</b>  Chief financial executive for \$75 million region; Integrated financial functions and conducted acquisitions during tenure.</p> </li> <li> <p>• 1983-1993      A-1 Ambulance Companies      Boulder, CO  <b>General Manager and General Partner (1983-1993)</b>  Executive responsibility for 5 closely held paramedic ambulance companies in Colorado, Wyoming, and New Mexico, 150 employees and \$10 million revenues</p> </li> </ul>

<b>Education</b>	<ul style="list-style-type: none"> <li>• 1989                                      University of Colorado                                      Boulder, CO  <b>PhD, Business Administration/Finance</b>  Minor in Information/DataBase Science</li>   <li>• 1987                                      College for Financial Planning                                      Denver, CO  <b>CFP® (Certified Financial Planner™) designation</b></li>   <li>• 1983                                      University of Colorado                                      Boulder, CO  <b>MBA, Business Administration/Finance</b>  Member: Beta Gamma Sigma</li>   <li>• 1981                                      University of Colorado                                      Boulder, CO  <b>BA, Psychology</b></li> </ul>
<b>Honors and Memberships</b>	<ul style="list-style-type: none"> <li>• Honors  Tissone Award for Teaching Innovation and Dedication,  Leeds Business School, 2007  Outstanding Leadership Award, American Medical Response, 1995  Gold Star Award for Excellence, American Medical Response, 1993</li>   <li>• Memberships  Financial Management Association  Financial Education Association  Financial Planning Association</li> </ul>
<b>University Courses Taught</b>	<ul style="list-style-type: none"> <li>• Introduction to Finance (undergraduate)</li> <li>• Corporate Finance (undergraduate)</li> <li>• Principles of Finance (graduate)</li> <li>• Investments and Portfolio Management (undergraduate and graduate)</li> <li>• Applied Financial Management-Case Course (undergraduate and graduate)</li> <li>• Senior Seminar in Finance (undergraduate)</li> <li>• CU Business Intensive Certificate Program (CUBIC)</li> <li>• Executive Education programs (graduate)</li> <li>• Investment Planning (CFP Certification Course)</li> </ul>
<b>References</b>	Available upon Request