

Derik Staufenberg

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EDUCATION:

OHIO UNIVERSITY

Athens, OH

Masters in Financial Economics--September 2010

Department of Economics

- Research Paper: *The Importance of the Risk-Free Rate when using the CAPM Formula in Forecasting Returns for the Gold, Financial and Energy Stock Sectors*

THE OHIO STATE UNIVERSITY

Columbus, OH

B.S. in Business Administration in Finance--June 2008

Fisher College of Business

WORK

EXPERIENCE:

Studying and Planning to take the Ohio Property and Casualty Insurance Exam May 2024

Possible part-time position with a leading Insurance Company

Financial Executives International - Central Ohio Chapter Columbus, OH
Board Member & Academic Relations Chair Aug. 2022 – Present

- Attend monthly board meetings on the financial health of the chapter and discuss new events
- Assists with monthly chapter meetings only for local business CFOs, Vice-Presidents of Finance and Treasurers
- Co-Directs the “Intern Night” with recruiting Finance and Accounting majors to attend the event. Along with contacting and inviting Business Professors from around Central Ohio to attend the event as well

Dave Ramsey Financial Coach
Financial Coach

Columbus, OH

July 2021 – Present

- Helping clients reach their financial goals by outlining a financial plan, save money, pay down debt, create a budget and establishing an emergency fund
- Completed Financial Coach Master Training with certificate: July 2021

ProNavigate
Business Launch Consultant

Boston, MA

July 2018 – Dec. 2019

- Selected to consult for ProNavigate to accelerate the development and assist with the launch of the career progression website
- ProNavigate is a start-up company specializing in highlighting career progression within various career fields
- Responsibilities include: business strategy, web development, identifying website engineers, beta testing and coordination between the president and website developers

THE OHIO STATE UNIVERSITY – Fisher COB **Columbus, OH**
Senior Lecturer – Finance Jan. 2017 – Present

- Currently teaching the following courses:
 - Business Finance 1200 – Personal Finance
 - Business Finance 3220 – Business Finance
 - Business Finance 3300 – Principles of Insurance
 - Business Finance 4200 – Applications in Finance
 - Business Finance 7650 – Personal Finance for the Health, Law and Public Policy Professionals
- Speaking Engagements in December 2021 and December 2022: The Ohio State University James Physician Wellness Program - Financial Literacy Education Series: Cash Flow Management, Understanding/Managing Credit and Your Purchasing Power
- Board Member and active participant in the local Columbus chapter of the Financial Executive International (FEI)

OHIO UNIVERSITY **Athens, OH**
Adjunct Professor – Economics Jan. 2015 – Dec. 2016

- Selected course materials, developed class syllabi and lectured in both the Principles of Microeconomics and Macroeconomics courses
- Utilized McGraw-Hill Education’s Dean Karlan and Jonathan Morduch’s *Microeconomics* and *Macroeconomics* textbooks for the courses

WRIGHT-PATT CREDIT UNION **Columbus, OH**
Financial Coach Oct. 2014 – July 2017

- Underwriting and processing loans at the Short North Member Center
- Coached and advised members in improving their financial health

FRANKLIN UNIVERSITY **Columbus, OH**
Economics Instructor Jan. 2014 – Feb. 2014

- Taught an intense 7 week Introduction to Macroeconomics course
- Excelled in the Franklin Faculty Certification (FFC) course. This course taught the essential skill set in becoming a superior college instructor, e.g., learning theories, feedback, grading, testing tools

SARNOVA, Inc. **Dublin, OH**
Financial Analyst Mar. 2011 – Sept. 2013

- Responsible for forecasting and reporting monthly on 100+ medical products (grossing \$350MM in Annual Net Sales) in KPIs and dashboards that included sales, cost of goods sold, gross profit and gross margin
- Perform Ad Hoc analysis for the C-Level and Senior Management Team

TUTOR **Columbus, OH**

Ohio University Graduate MFE Tutor

Jan. 2011 – Dec. 2012

ROSS, SINCLAIRE & ASSOCIATES, LLC
Public Finance Investment Banking Intern

Columbus, OH
Jan. – May 2010

- Participated as an underwriter for numerous Ohio and other state public finance offerings for local school districts and municipalities
- Assisted Senior Bankers in responding to RFP's & RFQ's for capital projects associated with bond underwriting for both State and Local Governments

BMW FINANCIAL SERVICES NA, LLC
Commercial Finance Credit/Audit Support Analyst

Hilliard, OH
Sept. 2008 – Aug. 2009

- Assisted in creating 50+ new/revised Security and Loan Agreements, Master Promissory Notes, Collateralization Agreements and Default Agreements
- Analyzed 100+ Certificates for BMW Floor Plan Insurance Documents

EDWARD JONES
Apprentice

Dublin, OH
June – Aug. 2008