

2025 Fall Report – DEPARTMENT OF FINANCE

Department of Finance - news

Faculty news

- Dr. Asli Eksi Linderkamp was tenured and promoted to Associate Professor effective July 1, 2026

Curriculum

- A new [FINA 241 Wealth Management Tax Planning](#) course is offered starting in the spring of 2026. It will replace the current ACCT 341 course in the financial planning curriculum and fulfill the new standards of the CFP Board. Our financial planning track is CFP Board approved since 2002.
- A new [Excellence Endowment for the Sea Gull Fund](#) was established with seed commitment of \$10,000 by Profs. Leonard Arvi, Herman Manakyan and Ani Mathers. This fund will help field trips for students and other high impact practices for students.
- Prof. Leonard Arvi and [Dr. Haley Cristea](#) of [Instructional Design & Development](#) office were awarded a competitive grant from Maryland Open Standards Textbook to develop open education resource content for personal finance. This will be deployed to Canvas Commons for the benefit of any higher education institution that uses Canvas learning management system.
- [Sharpen](#), an AI learning tool was piloted in the FINA 311 course taught by Leonard Arvi during the 2026 winter term.

High impact practices

- On October 3, 2025 we hosted the [Finance Career Day](#) at the Guerreri Academic Commons Assembly Hall. The following firms participated in this event
 - The Kelly Group
 - Brown Advisory
 - Back Bay Financial Planning & Investments
 - Wells Fargo Advisors
 - Comprehensive Financial Solutions
 - InFocus Financial Advisors
 - WealthSpire Advisors
 - Perdue Farms
 - Navy Federal Credit Union

An informative and engaging panel discussion consisting of [Mr. Jacob Adkins, CFP® \(2017 alum\)](#), [Mr. Shariar Chowdhury, CFP®](#), [Mr. Tyler Harrington](#), [Mr. Rober Jeter, CFP®](#), [Mr. Eric Johnston, CFP®](#), and [Mr. Michael J. Sise, CFP®](#), helped students better understand the impact of AI on the financial services industry.

- The department hosted the [25th anniversary celebrations](#) for the [SeaGull Fund](#) on Friday, December 12, 2025. Over seventy participants attended this event including alumni, advisory

board members and parents. A panel session featuring [Kevin Motamedi \(2012\)](#), [Kimberly S. Magaha \(2003\)](#), [Wes Cox \(2002\)](#) shared their thoughts about adoption of AI in finance, career strategies and skills students needed to be successful. At the meeting, lead analysts from the Practicum in Portfolio Management class (FINA 449) presented an overview of the Sea Gull Fund portfolio to advisory council members. The fund is currently valued at over \$2.8 million.

- On May 1, 2026, we will host the second Financial Planning Challenge competition. This year's Challenge is conducted in two stages. In the first stage, each participant prepares a comprehensive financial plan based on the facts, assumptions, and client objectives provided in the competition case. All participants are senior Finance majors enrolled in the Financial Planning track of our CFP Board Registered Financial Planning program. The six highest-performing students advance to the second stage of the Challenge, where they formally present their comprehensive financial plans to the "clients." The panel of judges is comprised exclusively of CFP® professionals. The top two winners will be awarded prize money sponsored generously by Kimberly Magaha family fund.
- Students attended the following professional development webinar series offered by the CFA Institute
 - Investment Strategist on September 9, 2025
 - Investor Relations on September 23, 2025
 - Equity Research Analyst November 4, 2025
 - Performance Measurement Analyst November 18, 2025

Students have access to CFA Institute's [career series videos](#) for possible career options in the investment industry

- Sea Gull Fund lead analysts Tim Benson, Brandon Jett, Garrett Parr, and Dillon Zanin along with Dr. Manakyan presented the Sea Gull Fund annual update to the SU Foundation Investment Committee on December 11, 2025.
- On October 31, 2025, Leonard Arvi served as a judge in the [Shore Hatchery competition](#) that awarded \$100,000 in grant money to early stage firms drawn from across the Mid-Atlantic region.
- Students in the FINA 443 Real Estate finance course had a site visit to [the Ross](#) complex in downtown Salisbury on September 11, 2025. They learnt about the opportunity zone development, tax credits and complexity of a ground up development in a tertiary market.
- Guest speakers in the finance courses during the fall of 2025

FINA 443 Essentials of Real Estate Finance	<ul style="list-style-type: none"> - Mr. Nick Marsch, Founder, Apex Storage Investments - Mr. Nick Simpson, CEO, Mentis Capital Partners - Mrs. Victoria Ballesterio, Founder & Principal, Guide Engineering
FINA 440 Corporate Finance	<ul style="list-style-type: none"> - Mr. Chris Bevenour, Director of FP&A, Perdue Farms

FINA 446 Retirement Planning	- Mr. Jason D. Nickerson , CFP®, EA, President & Chief Operating Officer, John G. Ullman & Associates, Inc.
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Guest speakers at Financial Management Association meetings during fall of 2025

<i>Date</i>	<i>Guest speaker</i>	<i>Designation, Institution</i>
Sep 4	Mr. Robert Jeter (2012 FINA, MGMT)	Founder/Financial Planner, Back Bay Financial Planning & Investments
Sep 25	Ms. Catherine Mucciolo (2015 FINA)	Trader, Fanne Mae
Oct 2	Mr. Quinn McLaughlin (2022 FINA, 2023 MBA)	Portfolio Analyst, Brown Advisory Services
Oct 9	Mr. Mason Little	Investment Advisor Representative, Comprehensive Financial Solutions
Oct 12	Mr. Keith Botti	Exec Director/Head of Capital Markets, ProShareAdvisors
Oct 23	Mr. Michael Zulferino	Vice President – Client Service Group, Nomura
Oct 30	Ms. Kim Magaha (2003, FINA, MGMT)	Managing Director, Wealthspire Advisors
Nov 6	Mr. Josh Danko (2015 ACCT, FINA)	Director of FP&A, Perdue Farms
Nov 20	Ms. Lauren Rath sack (2023 FINA)	Advisor Associate, Wealthspire Advisors
Dec 11	Ms. Jordan Scott (2023 FINA)	Sr. Financial Analyst, Raytheon

Social Impact:

Stock Market Challenge workshops conducted for 106 middle, high school students and 8 teachers. Students participate in the hands-on workshop on investing basics.

<i>Date</i>	<i>School Name</i>	<i>Students</i>	<i>Teachers</i>	<i>Instructor</i>
Dec 5	James M Bennett High , Wicomico county	30	3	Dr. Leonard Arvi
Nov 14	Parkside High School , Wicomico county	28	3	Mr. Tim Benson
Nov 7	Mardela Middle & High School , Wicomico	18	1	Dr. Leonard Arvi
Oct 24	Stephen Decatur High , Worcester county	30	2	Dr. Leonard Arvi

Outreach:

- The Financial Management Association and finance faculty volunteered at the Seagull Century bike ride event on Friday, Saturday 27, 2025 handing the cyclists their registration packets, t-shirts.
- Participated in the Salisbury University & 1 Year to Empowerment: Potential Partnerships meeting on September 5, 2025
- Leonard Arvi attended the Comptroller of Maryland's report release on ["The State of Housing in Maryland"](#) on October 16, 2025 at the Treasury building in Annapolis, MD. This invitation was due to his contribution to the Eastern Shore housing roundtable organized by the Comptroller in May of 2025.

- Presented the Perdue School's Executive Advisory Board meeting on November 21, 2025 on survey results of AI use in PSB and stock market game field trips hosted by the departmentsince fall of 2022
- Finance department participated in the intensive transfer workshop at the Hazel Center in Wor-Wic Community College on November 21, 2025. The workshop helped streamline a smooth transition for community college students completing their associate degree into the finance programs.

Community Service

- Dr. Ani Mathers serves a member of the Investment Committee, Community Foundation of the Eastern Shore
- Dr. Shine Lei serves as Council on Education member in the CFP Board
- Dr. Leonard Arvi serves as a board member of Junior Achievement of the Eastern Shore – Wicomico county and the Shore Hatchery competition board.

Faculty recognitions

- Prof. Kashi Khazeh was the department nominee for PSB Outstanding Teaching Award
- Dr. Shine Lei was the department nominee for PSB Outstanding Service Award