



Invitation to Present: 2019 AFCPE Research and Training Symposium
November 19 – 21, 2019
Portland, OR

The AFCPE Symposium is a unique 3-day event bringing together professionals across financial education, research, and practice.

There are five types of submissions accepted:

- Practitioners' Forum
- Poster
- Research Paper
- Research to Practice Forum
- Student Paper

We invite you to submit a completed proposal for consideration to present at this year's Symposium!

All submissions must be submitted through the [online platform](#) no later than **Monday, June 3, 2019 (11:59 pm ET)**.

Symposium submission topics should be relevant to household finance, consumer finance, personal finance, and behavioral finance.

Topics of interest include but are not limited to:

- **Consumer financial well-being**
- **Consumer financial literacy**
- **Consumer financial capability**
- **Consumer financial education**
- **Consumer financial behavior**
- **Consumer borrowing behavior**
- **Consumer saving and investing behavior**
- **Retirement planning**
- **Financial counseling and coaching**
- **Financial planning Health and financial issues**
- **Consumer financial protection**
- **Financial issues of low-income consumers**
- **Cross-cultural comparisons of consumer financial issues**
- **International issues of consumer finance**

Please read all information and instructions carefully.

The [online platform](#) will guide you through all guidelines and details by submission type (Practitioners' Forum, Poster, Research Paper, Research to Practice Forum, and Student Paper).

If you have questions about the submission process, please email the appropriate contact below:

Practitioners' Forum Questions: erin.deville_brown.ctr@us.af.mil, jketterm@umd.edu or mia.b.russell@wellsfargo.com

Poster Session Questions: swhitley@illinois.edu

Research Paper Questions: badarius1@gmail.com

Research to Practice Forum Questions: badarius1@gmail.com

Student Paper Questions: badarius1@gmail.com

GUIDELINES FOR SUBMISSION:

- Each proposal must be submitted through the [online platform](#).
 - All submissions are triple, blind reviewed. Please remove any identifying information. (i.e. names, organizations, universities, etc.)
 - All authors will receive an email outlining the status of their submission by **Monday, July 22, 2019.**
 - Accurate responses are required on all sections. Be sure that the author or presenter names, designations (e.g., PhD or AFC®), and affiliations appear as desired for any Symposium materials. Provide accurate email address information for notification of the authors.
 - **Please note:** names of authors and/or presenters will be published in Symposium materials and [Proceedings](#) as originally submitted.
 - The typical time allotted for verbal presentations during the symposium is 50 minutes, although we will have some concurrent sessions of 25 minutes available.
 - To ensure a diversified program, the Symposium task force may opt not to select more than 2 presentations with the same primary author or presenter.
 - By submitting a proposal, you agree that if your proposal is accepted you will:
 - Register for, **and** attend, the 2019 AFCPE Symposium.
 - Present your submitted topic or find a substitute presenter.
 - Submit your paper or topic submission in final, revised format for publication in the [Proceedings](#) no later than **Friday, August 23, 2019.**
 - Confirm you have received authorization for travel to the Symposium with your institution/employer prior to submitting a proposal (if applicable).
 - **For all submissions, maintain 1-inch top, bottom, and side margins using 12 point font with double spacing.**
 - **Student Paper and Research Paper Authors** should follow [APA Guidelines](#). Tables, charts, and figures should be integrated into the text. No text or tables should be prepared in landscape orientation, and the body of the text should start immediately under the abstract.
-

PRACTITIONERS' FORUM — IDEAS THAT WORK:

As a practitioner, the Practitioners Forum offers you the opportunity to share your successes or “ideas that work” with your colleagues in financial counseling, coaching, planning, and education. These sessions also provide an opportunity for you to exchange ideas, gather feedback, and expand your impact.

An award for “Best Symposium Practitioner Forum” is available for this category which includes a monetary award up to \$500.

Practitioners Forums can:

- Describe financial counseling, coaching, planning, or education programs or strategies;
- Present a workshop on new tools and techniques, including worksheets or fact sheets, as well as marketing tools/approaches;
- Share successful partnerships, e.g., How local needs were addressed or how funds were assembled to support a program/project.

Format for Practitioners Forum Submission

In a maximum of two double-spaced pages, use the following headings to describe the content and method of delivery of the program or strategy:

- Description of content and method
- Objective/purpose
- Impact/value to the field
- Target audience
- Questions or implications for researchers to help further improve the program/project tool.*

**This part of the proposal is optional but encouraged. AFCPE is a diverse and inclusive organization that is committed to bridging the gap between practitioners and researchers in the field. By suggesting opportunities for further exploration, you help us advance the field and close these gaps.*

Criteria for Evaluation

- Proposals will be evaluated on the following areas:
 - Importance/timeliness of topic
 - Relevance to profession
 - Ability to use in other counseling, coaching, or educational settings
 - Impact/value to Symposium participants

Please identify the forum type in your submission:

- Evidence-based practice/technique/program
- Emerging trend/potential for future research

If accepted, we recommend presentations follow this approximate format:

- Setup and introduction (10 min)
- Content (30 min)
- Wrap-up and questions (10 min)

Proceedings

Presenters of accepted proposals are invited to submit a two-page summary of your forum for the [Proceedings](#).

Why submit to the proceedings? Because it's a great way to ensure your findings and ideas are available to each and every Symposium attendee, regardless if they are able to attend your session in person. The deadline to submit is **Friday, August 23, 2019**.

POSTER SESSION:

The Poster Session is a regularly scheduled time during the Symposium for visual presentation of research, educational tool(s), or an educational or counseling/coaching methodology or program. During the Poster Session, presenters stand next to their posters to answer questions and provide additional information to Symposium attendees.

An award for “Best Symposium Poster” is available for this category which includes a monetary award up to \$200.

Format for Poster Submission

In a maximum length of two double-spaced pages, in 12 point font, briefly describe the project or program (not the poster itself but the project or program).

Criteria for Evaluation

Submissions will be evaluated on the following criteria:

- Literature review
- Purpose & justification
- Methods/research (if applicable)
- Results/discussions
- Conclusions/implications for financial counselors and educators in practice
- Organization & readability
- Citations & reference list
- Contribution to the *Journal of Financial Counseling and Planning (JFCP)* literature.

If accepted

- Poster Dimensions - Maximum 45" X 45"
- Poster boards and/or easels will be provided at the Symposium.
- Presenters will need to provide pushpins or velcro to mount their posters to the boards.

Proceedings

Authors of accepted submissions are invited to submit a two-page summary of the poster for the [Proceedings](#). This deadline is **Friday, August 23, 2019**.

Why submit to the proceedings? Because it's a great way to ensure your findings and ideas are available to each and every Symposium attendee, regardless if they are able to view your poster in person. The deadline to submit is **Friday, August 23, 2019**.

RESEARCH PAPERS:

Symposium papers include reports of research, comprehensive reviews of the literature, or description and/or evaluation of an educational or counseling/coaching methodology or program.

An award for “Best Symposium Research Paper” is available for this category which includes a monetary award up to \$500.

Format for Research Paper Submission

A detailed abstract is required by **Monday, June 3, 2019**.

The abstract must provide relevant information about your study using the following format:

- Title
- Background
- Purpose
- Conceptual Background or Theory (if any)
- Hypotheses or Research Questions
- Methodology (data source, sample characteristics, variables, analysis)
- Results and Discussion with Financial Counseling and Planning Implications

Criteria for Evaluation

Submissions will be evaluated on the following criteria:

- Literature review
- Purpose & justification
- Methods/research (if applicable)
- Results/discussions
- Conclusions/implications for financial counselors and educators in practice
- Organization & readability
- Citations & reference list
- Contribution to the *Journal of Financial Counseling and Planning (JFCP)* literature

What makes the AFCPE Symposium so unique, is that your audience is made up of practitioners, educators, and researchers. For this reason, we encourage you to frame your presentation a little differently – focusing on key learnings and implications for practice.

If accepted, we recommend presentations follow this approximate format:

- Purpose & justification (5 min)
- Key learnings & takeaways (15 min)
- Methodology (5 min)
- Implications for practice (20 min)
- Questions/discussion (15 min)

Proceedings Information

Authors of accepted proposals are expected to submit their final, revised manuscripts in the correct format for publication to the *Proceedings* by **Friday, August 23, 2019**. For Research Papers, the maximum length is 25 double-spaced pages, including tables, charts, figures, and references. Paper submissions should follow [APA Guidelines](#). Tables, charts, and figures should be integrated into the text, and the body of the paper should start immediately under the abstract. In addition, running headings will not be used. All pages should be numbered. **Pay special attention to section headings, citations within the text, and references.**

*Any accepted Research or Student paper will be accepted for an expedited review for the *Journal of Financial Counseling and Planning*. If you choose to have your paper reviewed and accepted for publication in our journal, please submit an abstract to the [Proceedings](#).

[RESEARCH TO PRACTICE FORUM \(New this year!\)](#):

It is through the integration of research, education, and practice that AFCPE supports professionals and strives to improve the economic well-being of individuals and families worldwide. Research to Practice presentations should demonstrate effective collaboration of research and practice to advance the field and elevate the standards. This might be a practitioner who is working closely with a researcher to implement successful research findings OR a researcher who is collaborating with a practitioner to further test their hypothesis and methodologies.

An award for “Best Symposium Research to Practice Collaboration” is available for this category which includes a monetary award up to **\$500 and up to 2 complimentary registrations to attend the 2019 AFCPE Symposium. This award is sponsored by National Endowment for Financial Education (NEFE).**

Format for Research to Practice Forum Submission

A detailed abstract is required by **Monday, June 3, 2019.**

The abstract must provide relevant information about your study using the following format:

- Description of content and method
- Background
- Objective/purpose
- Conceptual Background or Theory
- Research methodology (data source, sample characteristics, variables, analysis)
- Results and Discussion with attention to Financial Research, Education, & Practice implications

Criteria for Evaluation

Submissions will be evaluated on the following criteria:

- Importance/timeliness of topic
- Relevance to profession
- Methods/research
- Results/discussions
- Collaboration
- Conclusions/implications for financial counselors and educators in practice

If accepted, we recommend presentations follow this approximate format:

- Purpose & justification (5 min)
- Key learnings & takeaways (15 min)
- Methodology (5 min)
- Implications for practice (20 min)
- Questions/discussion (15 min)

Proceedings Information

Presenters of accepted proposals are invited to submit a two-page summary of your forum for publication to the *Proceedings* by **Friday, August 23, 2019**. For Research Papers, the maximum length is 25 double-spaced pages, including tables, charts, figures, and references. Paper submissions should follow [APA Guidelines](#). Tables, charts, and figures should be integrated into the text, and the body of the paper should start immediately under the abstract. In addition, running headings will not be used. All pages should be numbered. Pay special attention to section headings, citations within the text, and references.

*Any accepted Research or Student paper will be accepted for an expedited review for the *Journal of Financial Counseling and Planning*. If you choose to have your paper reviewed and accepted for publication in our journal, please submit an abstract to the [Proceedings](#).

Why submit to the Proceedings? Because it's a great way to ensure your findings and ideas are available to each and every Symposium attendee, regardless if they are able to attend your session in person. The deadline to submit is **Friday, August 23, 2019**.

STUDENT PAPERS:

Graduate and undergraduate students are encouraged to submit papers on financial counseling, coaching, planning, or education. Papers may be based on research, a comprehensive literature review, or description or evaluation of an educational or counseling methodology or program.

Outstanding Student papers are eligible for consideration for an award. All authors of the paper must be students at the time of submission. An award for "Best Symposium Student Paper" is available for this category which includes a monetary award up to \$500.

If your submission is selected, you will qualify for a Symposium Student Scholarship. This scholarship includes complimentary registration to the 2019 AFCPE Symposium, 1-night stay at a hotel selected by AFCPE, special mentorship opportunities and 2020 AFCPE Membership. Scholarship recipients, also have the opportunity to showcase their work or research. ***Co-authors, who meet the student requirements through AFCPE, will also qualify for a complimentary registration to the 2019 AFCPE Symposium, 1-night stay at the Symposium hotel, special mentorship, opportunities and 2020 AFCPE Membership.

Format for Student Paper Submission

A detailed abstract is required by **Monday, June 3, 2019**. The abstract must provide relevant information about your study using the following format:

- Title
- Background
- Purpose
- Conceptual background or theory (if any)
- Hypotheses or research questions
- Methodology (data source, sample characteristics, variables, analysis)
- Results and discussion with financial counseling and planning implications

Criteria for Evaluation

Submissions will be evaluated on the following criteria:

- Literature review
- Purpose & justification
- Methods/research (if applicable)
- Results/discussions
- Conclusions/implications for financial counselors and educators in practice
- Organization & readability
- Citations & reference list
- Contribution to the *Journal of Financial Counseling and Planning (JFCP)* literature

What makes the AFCPE Symposium so unique, is that your audience is made up of practitioners, educators, and researchers. For this reason, we encourage you to frame your presentation a little differently – focusing on key learnings and implications for practice.

If accepted, we recommend presentations follow this approximate format:

- Purpose & justification (5 min)
- Key learnings & takeaways (15 min)
- Methodology (5 min)
- Implications for practice (20 min)
- Questions/discussion (15 min)

Proceedings Information

Authors of accepted proposals are expected to submit their final, revised manuscripts in the correct format for publication to the *Proceedings* by **Friday, August 23, 2019**. For Student Papers, the maximum length is 25 double-spaced pages, including tables, charts, figures, and references. Paper submissions should follow [APA Guidelines](#). Tables, charts, and figures should be integrated into the text, and the body of the paper should start immediately under the abstract. In addition, running headings will not be used. All pages should be numbered. **Pay special attention to section headings, citations within the text, and references.**

*Any accepted Research or Student paper will be accepted for an expedited review for the *Journal of Financial Counseling and Planning*. If you choose to have your paper reviewed and accepted for publication in our journal, please submit an abstract to the [Proceedings](#).