



Invitation to Present: 2021 *VIRTUAL* AFCPE Research and Training Symposium

The AFCPE Symposium is a unique experience bringing together professionals across financial education, research, and practice.

The Symposium Task Force will consider 6 types of submission proposals:

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

About Student Submissions:

- **Eligibility:** Applicants must be current university or college students studying full-time at the undergraduate (at least 12 credits), graduate (at least 9 credits), or PhD (at least 3 credits) level. If a student is currently enrolled at an AFCPE Registered Education Program, full and part-time students at any level of study may apply.
- **If Accepted:** The student will receive a Symposium Student Scholarship, covering the cost of registration.
- **Please note:** Student Research Paper submissions are considered to present during a breakout session and Student Project submissions are considered to present during the Poster Session.

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 the following:

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

All submissions must be submitted through the [online platform](#) no later than **Friday, June 4, 2021 (11:59 pm ET)**.



Please read all information and instructions carefully.

The [online platform](#) will guide you through all guidelines and details by submission type.

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

Practitioners' Forum Questions: erin.deville_brown.ctr@us.af.mil, cain.t.hill@gmail.com, or willa@mytfcoach.com

Poster Session Questions: ketterm@umd.edu or bill@moneycoachgroup.com

Research Paper Questions: badarius1@gmail.com or miabrussell@gmail.com

Research to Practice Forum Questions: badarius1@gmail.com or miabrussell@gmail.com

Student Research Paper Questions: badarius1@gmail.com or miabrussell@gmail.com

Student Project Questions: sparrish@afcpe.org

GUIDELINES FOR SUBMISSION:

- Each proposal must be submitted through [this portal](#).
- **For all submissions, maintain 1-inch top, bottom, and side margins using 12-point font with double spacing.**
- **Student Research 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.
- All submissions are blind reviewed by five reviewers. **Please remove any identifying information.** (i.e. names, organizations, universities, etc.)
- All presenters will receive an email outlining the status of their submission by mid-August 2021.
- 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 presenter(s).
- **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, however to better hold the interest of a virtual audience, AFCPE is offering a variety of presentations, to include **50-minute, 25-minute or 10- minute.**
- To ensure a diversified program, the Symposium taskforce 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** participate in the 2021 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 **Monday, September 21, 2020.**
 - Confirm speaker(s) have received authorization to participate in the Symposium with their institution/employer prior to submitting a proposal.



PROPOSAL TYPES:

PRACTITIONERS' FORUM:

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.

Practitioners' Forums can:

- Describe financial counseling, coaching, planning, or education programs or strategies
- Present a workshop on new practical tools and techniques or marketing 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, 12 point font, (page max does not include citations or references) 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

Please identify the forum type in your submission:

- Evidence-based practice/technique/program
- Emerging trend

Criteria for Evaluation - [Download the scoring rubric.](#)

Presentation Suggestions:

If accepted, we recommend that 50-minute 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](#). This is a great way to ensure your findings and ideas are available to each and every Symposium participant, regardless if they are able to attend your live session. The deadline to submit is **Monday, September 20, 2021**.



POSTER SESSION:

The Poster Session offers an opportunity for visual presentation of:

- Research
- Educational tool(s)
- An educational or counseling/coaching methodology or program

Format for Poster Submission

Project or program (not the poster itself) must be described in a **maximum length of two double-spaced pages in 12-point font (page max does not include citations or references).**

If accepted, Poster Presenters will:

- Provide a one-page PDF of Poster, by **October 31, 2021**
- Submit a brief pre-recorded presentation, no more than 5 minutes, by **October 31, 2021**
- Participate in live chat during the Symposium Poster Session

Criteria for Evaluation - [Download the scoring rubric.](#)

Proceedings

Authors of accepted submissions are invited to submit a two-page summary of the poster for the [Proceedings](#).

This deadline is **Monday, September 20, 2021**. This is a great way to ensure your findings and ideas are available to each and every Symposium participant.

RESEARCH PAPER:

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.

Format for Research Paper Submission:

Please submit a detailed abstract (**max. 25 double-spaced pages in 12-point font, not including citations or references**) that provides relevant information about your study.

Use 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 - [Download the scoring rubric.](#)

Journal of Financial Counseling & Planning (JFCP) Consideration

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

Proceedings Information

Authors of accepted proposals are expected to submit their final, revised manuscripts in the correct format for publication to the *Proceedings* by **Monday, September 20, 2021**. For Research Papers, the maximum length is 25 double-spaced pages, including tables, charts, and figures, (citations and references may be additional pages). 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 heads will not be used. All pages should be numbered. **Pay special attention to section heads, citations within the text, and references.**

Presentation Suggestions:

What makes the AFCPE Symposium so unique is that your audience is made up of practitioners, educators, and researchers. By presenting your research, you'll receive recognition and insights from fellow researchers, but also inform the practical side of our field with your findings, thus opening opportunity for future research. For this reason, if selected, we encourage you to frame your presentation a little differently. Focus on key findings and implications for practice.

If accepted, we recommend 50-minute 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)

RESEARCH TO PRACTICE FORUM:

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-

This might be a researcher who is collaborating with a practitioner to further test their hypothesis and methodologies.



Format for Research to Practice Forum Submission

Please submit an abstract (**max. 5 double-spaced pages in 12-point font, page max does not include citations or references**) providing relevant information about your collaboration:

- Background
- Description of content and method
- 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.

If accepted, we recommend 50-minute 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)

Criteria for Evaluation - [Download the scoring rubric.](#)

Proceedings

Authors of accepted submissions are invited to submit a two-page summary of the presentation for the [Proceedings](#). This deadline is **Monday, September 21, 2021**. It's a great way to ensure your findings and ideas are available to each and every Symposium participant, regardless if they are able to view your poster in person.

STUDENT SUBMISSIONS:

STUDENT RESEARCH PAPER OR STUDENT PROJECT

Again this year we are offering two submission pathways for full or part-time undergrad or graduate students - Student Research Paper or a Student Project.

Any student submission accepted through these two platforms will receive a Student Scholarship, which includes:

- Complimentary registration to the 2021 AFCPE® Symposium, which includes 2022 AFCPE Membership



Student Research Paper

For students who would like to share their research as a breakout session.

Papers may be based on research, a comprehensive literature review, or description or evaluation of an educational or counseling methodology or program.

Format for Student Research Paper Submissions:

Please submit a detailed abstract (**max. 25 double-spaced pages in 12-point font, not including citations or references**) that provides relevant information about your study.

Use 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 - [Download the scoring rubric.](#)

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If accepted, we recommend 50-minute 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)

Student Project

For students who would like to share their project as a poster.

Students must submit a project from the 2020-2021 academic year (i.e. video, fact sheets, case studies, etc.) While the project should be professional, it does not need to be purely academic. A creative project to get people interested in, or excited about, personal finance (e.g. writing and performing a song on a financial topic or instituting a marketing campaign or competition on a personal finance topic) are also appropriate.

Project submission may **not be longer than 25 pages, double-spaced, 12 point font (inclusive of tables, graphs, etc.)**.

Criteria for Evaluation - [Download the scoring rubric.](#)

Poster Presenters will:

- Provide a one-page PDF of Poster, by October 31, 2021
- Submit a brief pre-recorded presentation, no more than 5 minutes, by October 31, 2021
- Participate in live chat during the Symposium Poster Session

Proceedings

Authors of accepted submissions are invited to submit a two-page summary of the poster for the [Proceedings](#). This deadline is **Monday, September 20, 2021**. This is a great way to ensure your findings and ideas are available to each and every Symposium participant.

AWARDS:

A \$500 award will be granted to the highest scoring:

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

Additionally, an award for “Best Symposium Research to Practice Collaboration” is available for this category which includes a monetary award of \$500 and up to 2 complimentary registrations to participate in the 2021 AFCPE Symposium. This award is sponsored by [National Endowment for Financial Education \(NEFE\)](#).



AFCPE's Commitment to Diversity & Inclusion:

"Diversity and inclusion ensure a safe, positive, nurturing, and tolerant environment with mutual respect, free of prejudice. They celebrate differences, including those visible and invisible, in addition to thoughts and opinions that are essential for the involvement and empowerment of our society."

- Definition established by AFCPE Diversity & Inclusion Task Force

At AFCPE, every decision we make goes through an equity screen. Here are the [questions](#) we ask ourselves when making decisions. Before submitting, make sure your submission has a lens of inclusion.