TRAVIS L. JONES

March 2011

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AREAS OF INTEREST

Research: Initial Public Offerings, Derivative Security Markets, Investments
Teaching: Investments, Financial Management, Derivative Securities

EDUCATION

2005	Ph.D.	Finance	University of Alabama
2001	M.A.	Finance	University of Alabama
1999	B.S.	Finance	Auburn University

ACADEMIC EXPERIENCE

2010 – present	Associate Professor of Finance	Florida Gulf Coast University
2005 – 2010	Assistant Professor of Finance	Florida Gulf Coast University
2001 – 2005	Graduate Teaching Assistant	University of Alabama

COURSES TAUGHT

FIN 3403	Business Finance	Florida Gulf Coast University
FIN 3414	Financial Management	Florida Gulf Coast University
FIN 3504	Principles of Investments	Florida Gulf Coast University
FIN 4533	Derivative Securities	Florida Gulf Coast University
FIN 4934	Student Managed Investment Fund	Florida Gulf Coast University
FIN 6406	Financial Management (MBA)	Florida Gulf Coast University
FIN 6515	Analysis of Investments (MBA)	Florida Gulf Coast University
FI 301	Intro. to Financial Institutions and Markets	University of Alabama
FI 302	Business Finance	University of Alabama
FI 410	Intermediate Financial Management	University of Alabama

PEER-REVIEWED PUBLICATIONS

"Using Reverse Mergers to take Chinese Companies Public on U.S. Securities Markets: The Case of China AutoStar" (with Daniel Borgia and Arthur Rubens), *Journal of Financial Education*, forthcoming.

"An Application of Asset-Liability Management (ALM) for Financial Planners" (with Jack Brown), *Journal of Financial Planning*, forthcoming.

"A Look at the Use of VIX Futures in Investment Portfolios: Buy-and-Hold versus Tactical Allocations," *Journal of Trading*, Spring 2011.

"An Endogenous Examination of Underwriter Reputation and IPO Initial Returns" (with Musfiq Swaleheen), *Managerial Finance*, April 2010.

"Accounts Receivable Factoring As A Response to Weak Governance: Panel Data Evidence" (with Daniel Borgia, H. Shelton Weeks, and Musfiq Swaleheen), *International Journal of Business & Economics Research*, February 2010.

"Integrating Asset-Liability Risk Management with Portfolio Optimization for Individual Investors" (with Jack Brown), *Journal of Wealth Management*, Winter 2009.

"Characterizing Student Finance Organizations-A Survey of FMA Chapters" (with Steve P. Fraser and H. Shelton Weeks), *Journal of Economics and Finance Education*, Summer 2009.

"The Day Of The Week Effect in IPO Initial Returns" (with James Ligon), *Quarterly Review of Economics and Finance*, February 2009.

"Day-Of-The-Week Effect in the Seasoned Equity Offering Discount" (with X. Fu and T. Tang), *Managerial Finance*, January 2009.

"A Note for Appraisers on Option Valuation" (with J. Howard Finch and H. Shelton Weeks), *Appraisal Journal*, Summer 2008.

"Speedways, Economic Development, and Home Values" (with Arthur Rubens, William J. Ritchie, and H. Shelton Weeks), *Journal of Real Estate Practice and Education*, Winter 2008.

"An Examination Of Underwriter Reputation, File Amount, and IPO Initial Returns," *Financial Decisions*, Winter 2007.

"Investor Type, Transaction Fees, and Single-Stock Futures," *Journal of Trading*, Winter 2007.

"Agricultural Applications of Weather Derivatives," *International Business & Economics Research Journal*, May 2007.

"An Analysis of Single-Stock Futures Trading in the U.S." (with Robert Brooks), *Financial Services Review*, June 2005.

WORKING PAPERS AND WORKS IN PROGRESS

"Property Taxes: Are Property Owners Getting their Money's Worth" (with William J. Ritchie and H. Shelton Weeks), Working Paper.

“Equity-Weighted Performance Methodology for Stock Portfolios” (with Jack Brown), Working Paper.

“Stock Returns and State-Level Corruption,” (with Mushfiq Swaleheen) Data Analysis Stage.

OTHER PUBLICATIONS

“Asset-Liability Risk Management with Private Wealth,” (with Jack Brown), *CFA Institute Private Wealth Management Newsletter*, April 2010.

“Weathering the Storm,” (with Howard Finch, Steve Fraser, Gary Jackson, and Dan Regelski), *Pinnacle Magazine*, Spring 2009.

CONFERENCE PARTICIPATION

“Property Taxes: Are Property Owners Getting their Money’s Worth,” accepted for presentation, 2010, American Real Estate Society, Naples, FL.

“Using Reverse Mergers to take Chinese Companies Public on U.S. Securities Markets: The Case of China Autostar,” accepted for presentation, 2009, Academy of International Business, Jacksonville Beach, FL.

“Using a Reverse Merger to take Chinese Companies Public on U.S. Securities Markets: The Case of China Autostar,” accepted for presentation, 2008, Academy of Business Disciples, Fort Myers Beach, FL.

“Property Taxes: Are Property Owners Getting their Money’s Worth,” accepted for presentation, 2007, Southern Finance Association, Charleston, SC.

Session Chair and Discussant, 2007, Southern Finance Association, Charleston, SC.

Participant, Redefining Investment Strategy Education (RISE) Forum, 2007, Dayton, OH.

“Day-of-the-Week Effect in the SEO Discount,” accepted for presentation, 2006, Southern Finance Association, Destin, FL.

“Using Replacement Costs to Understand Derivative Pricing,” accepted for presentation, 2006, Southern Finance Association, Destin, FL.

“Does a Calendar Effect Exist in IPO Initial Returns?” accepted for presentation, 2005, Southern Finance Association, Key West, FL.

Discussant, 2005, Southern Finance Association, Key West, FL.

Discussant, 2005 Financial Management Association Conference, Chicago, IL.

Participant, 2005 Allied Social Science Association Conference, Philadelphia, PA.

UNIVERSITY SERVICE ACTIVITIES

2010 – present	Florida Gulf Coast University – Undergraduate Program Committee
2009 – present	Florida Gulf Coast University – Academic Integrity Committee
2009 – present	Advisor for CFA Investment Research Challenge Team from FGCU
2006 – present	Florida Gulf Coast University – FMA (finance club) Faculty Advisor
2009 – 2010	Florida Gulf Coast University – Faculty Senate
2005 – 2009	Florida Gulf Coast University – Faculty Advisory Council
2006 – 2007	Florida Gulf Coast University – Finance Faculty Search Committee

EXTERNAL SERVICE ACTIVITIES

2007 – present	CFA Society of Naples – University Liaison/Board of Directors
2011	Community Presentation, Pelican Bay, Naples, FL
2009 & 2010	Ad hoc Reviewer for *Managerial Finance*
2008	Ad hoc Reviewer for *Journal of Housing Research*
2007	Ad hoc Reviewer for *Financial Decisions*
2006	Ad hoc Reviewer for *Financial Services Review*

HONORS AND AWARDS

2010	Awarded, *Citizen of the Year*, by the CFA Society of Naples

PROFESSIONAL EXPERIENCE

2007 – present	Senior Investment Strategy Advisor Laureola Asset Management An investment portfolio management firm, based in Naples, Florida
1999 – present	Associated Person and Principal R.G.J. Trading, Inc. A futures brokerage with Daniels Trading, a division of R.J. O'Brien

PROFESSIONAL MEMBERSHIPS

Southern Finance Association
CFA Society of Naples/CFA Institute

PROFESSIONAL DESIGNATIONS

Series 3: futures broker
Series 65: investment advisor