Curriculum Vitae for E. Thomas Fleck

E. Thomas Fleck
18 Thomas Farm
Landenberg, PA 19350

Research Interests

Retirement Plan Education, Investments and Fee Disclosure, Small Business Strategic Planning, Investment Theory, Corporate Valuation

Education

MBA in Finance, 1981 – University of Delaware. Master's Thesis: *Trends in Student Matriculation at the University of Delaware*
BA in Pre-Law – 1974 – SUNY at Binghamton

Certified Employee Benefit Specialist (CEBS) 1986 ISCEBS

Appointments

Adjunct Professor: Goldey-Beacom College, Finance Department, 2013 to Present
Courses taught: Graduate: Finance 599, Finance 623 Financial Management, Finance 665 Corporate Valuation
Undergraduate: Finance 333 Introduction to Finance, Finance 475 Derivatives, ECO344 Money and Banking. Also, co-created a new course, MGT308: Personal Financial Management

Adjunct Professor: Wilmington University, Graduate Finance Department 2014-2017
Courses taught: Finance 7292 and 7293: Investments and Portfolio Theory

Adjunct Professor: University of Delaware, Alfred P. Lerner College of Business 2018-Present
Courses taught: BUAD110 Introduction to Business/First Year Experience, BUAD167 Lab Course for BUAD110.

CAP Cohort Program Instructor: University of Delaware English Language Institute 2016 – Present
Courses taught: All Four Required Modules

CEBS Instructor: University of Delaware, Lifelong Learning Center 1990-1993
Courses taught: 8 out of the 10 required courses for CEBS designation

Career Accomplishments

25+ years' experience in senior level financial management positions
A key team member to create the original design for the 401(k) retirement plan; later helped create 1) same day/overnight exchanges of investments between mutual funds offered by different firms, 2) group tailored plan participant education programs, and 3) self-directed brokerage account option.

Graduate of Miller-Heiman and Spin Selling Sales Programs.
Dale Carnegie Instructor

Conference Presentations

2010. Fleck, E. Thomas "How to leverage new retirement plan design options for your clients." AICPA Annual Conference, Las Vegas, NV.

2008 Fleck, E. Thomas " Retirement plan design best practices for small business owners." Nebraska and Iowa Business Owner Association, Des Moines, IA.

2005 Fleck, E. Thomas "Fiduciary Responsibility Best Practices for Bank Trust Officers." North Dakota Association of Bank Trust Officers Annual Meeting, Fargo, ND.

Goldey-Beacom College Contributions

2018-Present Adjunct Faculty Member of Faculty Assembly

- Researched and presented recommendations to enhance adjunct professor evaluations

2021

- First Presenter for College Wide Lunch and Learn Program: 10 Top Tips for a More Secure Financial Future
- Joined two strategic planning committees: Program Add/Drop/Amend and Compensation and Benefits

2020 Created and Executed Adjunct Professor Survey
2019 Co-Created new undergraduate course Personal Financial Planning
2018 Presented to GBC Quantitative Seminar: "The Long-Term Effects of Fees on Retirement Plan Wealth Accumulation"