
PENNWEST TEAM ADVANCES TO FINANCIAL PLANNING CHALLENGE FINALS



September 24, 2024

A team consisting of three PennWest University finance and personal financial planning students advanced to the final phases of the Financial Planning Challenge, hosted by the Financial Planning Association, Ameriprise and the Certified Financial Planner Board of Standards.

PennWest students Lydia Solomon (Edinboro), McKensie Crooks (Edinboro) and Vincent Damiani (Clarion) led the team to their second consecutive finals phase appearance – the fourth in the past six years for members of the Edinboro campus.

Additionally, PennWest students Elijah Yoder, Paige Dunlap, Emily Cevera, Olivia Kaufmann, Josie Delp, Aaron Collins and Justin DeBias also attended the challenge and the Financial Planning Association's annual conference Sept. 18-29 in Columbus, Ohio.

"Our continued success in the nation's top collegiate financial planning competition reaffirms that PennWest's programs are among the top in the nation," said Dr. Mike Engdahl, PennWest professor and team advisor. "We have many intelligent and hardworking students at PennWest, and our faculty do an outstanding job educating and preparing our students."

The Financial Planning Challenge is a distinctive three-phased competition designed exclusively for undergraduate degree programs registered with the CFP Board.

In the first phase, all student teams were given a profile for hypothetical clients and prepared a comprehensive financial plan. Next, the first phase was judged, and the top eight schools advanced to the next phases of the competition.

PennWest advanced to the second and third phases alongside students from Texas Tech University, University of Arizona, Ohio State University, University of Illinois, Texas A&M University, Utah Valley University and University of Utah.

In Phase 2, all teams orally presented their financial plan to a panel of judges, and in Phase 3, the teams competed in a financial planning quiz bowl titled, "How Do You Know?"

To learn more about PennWest's CFP Board Registered personal financial planning academic programs, contact Engdahl at mengdahl@pennwest.edu.

Photo: Dr. Mike Engdahl, Aaron Collins, Olivia Kaufmann, Lydia Solomon, Elijah Yoder, McKensie Crooks, Emily Cevera, Paige Dunlap, Justin DeBias and Josie Delp.