THE OHIO STATE UNIVERSITY

Fisher College of Business Workshop Series: Graduate Personal Finance

Instructor: Senior Lecturer Derik Staufenberg, M.F.E.
Summer Semester 2026
Workshop Time: Saturday, July 18 (8 AM- 5 PM)
Workshop Location: Gerlach Hall Room 365

Office: Mason Hall, Office 251
Office Hours: TBA
Instructor email: staufenberg.3@osu.edu

Course Overview:

This class is designed for the graduate student that wants to learn more about personal finance. This class will cover topics such as the importance of budgeting, leadership principles, insurance coverage, retirement plans, estate planning and understanding your credit scores & credit reports.

Course Learning Outcomes:

By the end of this course, students should successfully be able to:
• Develop a personal budget
• Define and understand Leadership Principles
• Develop a comprehensive risk management (insurance) plan
• Define the main components of estate planning
• Understanding retirement plans
• Understanding your credit scores and credit reports

Faculty Profile:

Derik Staufenberg:

- The Ohio State University - Undergraduate degree in Finance at the Fisher College of Business
- Ohio University - Masters of Financial Economics
- 15+ years of combined working and teaching experience
- Senior Lecturer in Finance at The Ohio State University Fisher College of Business
- Previously taught Economics at Ohio University and as a Financial Coach with Wright-Patt Credit Union
- Ohio Insurance Licenses – NPN: 21371090: Accident & Health, Casualty, Life, Property

Attendance will be taken through Top Hat: tophat.com. Instructions in how to sign-up for Top Hat will be given in class.

Workshop Schedule:

8:00-8:15AM – Class Introduction & a welcoming message from Dean Aravind Chandrasekaran

8:15-9:30AM – Introduction to Graduate Personal Finance with Dr. Mark Caner - 5 points

15 Minute Break

9:45AM-10:30PM – Leadership Principles with Dr. Mark Caner - 5 points

15 Minute Break

10:45AM-12:00PM – Principles of Insurance with Hans Schell, State Farm Agent - 5 points

1 Hour Lunch

1:00-2:15PM – Estate Planning with Bob Hendrix, J.D. - 5 points

15 Minute Break

2:30-3:45PM – Retirement Planning with Brian Minier, M.B.A. - 5 points

15 Minute Break

4:00-5:00PM – Assessing and Securing Your Credit with Derik Staufenberg, M.F.E. - 5 points

Post-class assignment(s): Please choose one.

1. Reading reflection paper: Students are required to submit a reflection paper related to the book from Tim Church and Tim Ulbrich, "Seven Figure Pharmacist" by 11:59 PM on Thursday, July 30th.

   OR

2.
   a. Assignment: Evaluating your own credit report due at 11:59PM on Thursday, July 30th - 5 points
   b. Assignment: Estate Planning due at 11:59PM on Thursday, July 30th - 8 points

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Assignments

<u>Pre-class assignment</u>:

Assignment: Introduction to the Class due at 11:59PM on Friday, July 17th - 10 points

Assignment: Budget Worksheet due at 11:59PM on Friday, July 17th - 8 points

Assignment: Risk Tolerance Questionnaire due at 11:59PM on Friday, July 17th - 6 points

<u>In class assignment</u>:

Assignment: TopHat - Class Attendance due at 5:00PM on Saturday, July 18th - 30 points

<u>Post-class Assignment:</u>

Assignment: Post-class reflection paper due at 11:59PM on Thursday, July 30th - 10 Points

If you read the Seven Figure Pharmacist book

Reflection Paper due at 11:59PM on Thursday, July 30th - 13 Points

OR

If you did <u>not</u> read the Seven Figure Pharmacist book

Assignment: Evaluating your own credit report due at 11:59PM on Thursday, July 30th - 5 points

Assignment: Estate Planning due at 11:59PM on Thursday, July 30th - 8 points

Grading scale:
80-100% – S (Satisfactory)
<80% – U (Unsatisfactory)

<u>Graded Material:</u>	**<u>% of Grade out of 77 points</u>**
Pre-class assignment	24 points/77 points = 31.2%
Class Attendance/Quality of in-class engagement	30 points/77 points = 39.0%
Post-class Reflection Paper	10 points/77 points = 13.0%
Book reflection paper OR credit report & estate planning assigns.	13 points/77 points = 16.8%