

# JULIA GARDNER PLOTTS

Associate Professor of Clinical Finance and Business Economics

Department of Finance and Business Economics

Marshall School of Business, University of Southern California

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## Education

MBA, 2000, Marshall School of Business, University of Southern California

BA, 1994 (English Literature, Political Science), Loyola Marymount University

Certificate in Comparative Political & Economic Systems, 1994, Georgetown University

## Academic Positions

### **University of Southern California, Marshall School of Business**

*Associate Professor of Clinical Finance and Business Economics* 2014-present

*Assistant Professor of Clinical Finance and Business Economics* 2006-2014

*Lecturer, Assistant Department Chair, Finance and Business Economics* 2003-2006

*Part-Time Lecturer* 2002

### **University of Melbourne, Melbourne Business School**

*Adjunct/Visitor, Executive MBA Program* May-July 2008

## Non-Academic Positions

Banc of America Securities LLC, Global Corporate Investment Banking Group 1999-2002

Epson America International, Corporate Strategy Group 1999

Los Angeles Area Chamber of Commerce 1998

Davis Polk & Wardwell, Financial Institutions Group 1995-1998

U.S. House of Representatives, Committee on Banking & Financial Services 1995

California Governor Pete Wilson 1994

## Honors & Awards

- Seven Time Recipient of the USC Marshall Golden Apple Teaching Award
  - Finance & Business Economics – MBA.PM Graduate Program Core (2013)
  - IBEAR MBA program (2012)
  - Undergraduate Program (2005, 2007, 2010, 2012, 2014, 2016)
- Recipient, Evan C. Thompson Teaching & Learning Innovation Award for Mentoring (2012)
- Recipient, Evan C. Thompson Teaching & Learning Innovation Award for Teaching (2011)
- Recipient, Dean's Award for Community (2010)
- Recipient, USC Mellon Mentoring Award (2010) – selected from 400+ USC faculty
- Finalist, USC Parents Council Teaching and Mentoring Award (2010)
- Recipient, USC Parents Council Teaching and Mentoring Award (2009)
- Sigma Chi Fraternity Professor of the Year (2009)
- Honorary Faculty Initiate Delta Sigma Pi (2009)
- Faculty Excellence Award, Alpha Lambda Delta (2008)
- "Tapped" by the Mortar Board, USC's Torch & Tassel chapter (2007)
- Honored Speaker, USC Office of Religious Life "What Matters to Me & Why" (Fall 2007)

***Teaching***

*Finance and Business Economics Department, USC Marshall School of Business, 2002-present*

**Median Teaching Evaluation Score 4.7/5** (Instructor and Course Ratings compiled from 91 courses and 5,590 students)

**GSBA 552**, Problem Solving & Decision Making: An Integrative Approach, FT MBA Project Course. Nestlé USA M&A/Strategy project, 2015-present.

**GSBA 571**, Strategic Management and Finance, Global EMBA USC Marshall/Shanghai Jiaotong University - Theme 8a Finance, Co-taught with Dr. Arvind Bhambri, 2009-present.

**GSBA 561**, Evaluating Market Performance, Financial Management Executive MBA Los Angeles and San Diego Theme 2 Finance, 2009-present.

**GSBA 548**, Business Finance (IBEAR core finance) 2011-2013

**FBE 529**, Financial Analysis and Valuation (MBA elective) 2005-present

**FBE 421**, Financial Analysis and Valuation (Undergraduate elective), 2002-present

- Course topics include financial analysis and valuation theory, frameworks and application

**BUAD 490**, Directed Research (Undergraduate Elective – Honors Thesis), 2003-present

- Serve as honors thesis advisor to approximately 2-3 undergraduates each semester

**BUAD 215, 306** Business Finance (undergraduate business major core course), 2004-2006

- Provides an introductory framework for understanding the choices made in financial markets by investors and corporations including financial problems of business enterprise, sources of funds, financial instruments, and financial institutions

**Global Programs**

**GSBA 582**, Business Environment and Management Practices in the Pacific Rim, Singapore-Thailand,

**BUAD 104**, Learning about International Commerce: Hong Kong 2008-2009; Sydney 2010-present (undergraduate elective – Global Business)

- Provide students insight into the opportunities and challenges faced by business professionals operating in a global environment, includes international field study trip with company site visits.

**ExCEL Manila 2015, ExCEL Hong Kong 2016**

*University of Melbourne, Melbourne Business School, Australia*

Financial Management (Core EMBA) and Mergers and Acquisitions (2<sup>nd</sup> Year EMBA) 2008

*CFA® Review Program Level II - Equity Asset Valuation* 2009-2013

*USC Masters in Medical Management Program* 2012-present

*USC Marshall Summer Business Program* 2013

*USC Marshall Masters in Business Veterans Program* 2013-present

**Professional and Administrative Service**

- Currently serving as lead faculty member on ExCEL Hong Kong 2016
- Currently serve as co-chair FBE Department Clinical Faculty Search Committee
- Currently serve as the FBE representative on the USC Committee on Communication
- Currently serve on USC Marshall Executive Education Task Force to develop a Master of Science in Food Industry Management and Leadership
- Served on the Faculty Council's Task Force to review the APR Process and Faculty Recognition 2015
- Served as lead faculty member on ExCEL Manila, Philippines 2015
- Served on the USC Committee on Non-Tenure Track Faculty Affairs 2014-2015
- Served on the Marshall Graduate Instruction Committee 2014-2015
- Served on USC Marshall Undergraduate Committee on International Experience 2011
- Served on the selection committee for the Mellon Mentoring Award 2011
- Selected by Dean Ellis to serve as the lead-faculty for the inaugural USC Marshall Stellar Women's Leadership Delegation to Beijing, Lijiang and Shanghai, China. (2011)
  - Led a delegation of 15+ women leaders in social enterprise, education and aerospace with 15 leading female Marshall students for a 10-day multigenerational women's leadership mission to China to engage in discussion, exchange ideas and link women leaders of the United States and China.
- Faculty Advisor to the Marshall Duff & Phelps Youniversity Deal Challenge (2012-present).
- Co-Faculty Advisor to the Marshall CFA Investment Challenge Team (2009-2010); placed 2<sup>nd</sup> (2010-2011) placed 1<sup>st</sup>.
- Faculty Advisor Marshall Case Team (2008-present); coached Marshall teams for MICC 2013 (finalist), Auckland Champions Trophy 2010 (placed 3<sup>rd</sup>) and 2012, Thamassat University Business Challenge 2011, Copenhagen Business School Case Competition 2011, McCombs International Business Challenge (MIBC) University of Texas 2008, Marshall International Case Competition (MICC) 2013.
- Faculty Advisor, Wall Street Journal and Nationwide BizQuiz Competition Team, 2007 (placed 2<sup>nd</sup>).
- Faculty Advisor to Marshall Undergraduate Investment Banking Leadership Trips to New York (2007, 2009, 2010, 2011, 2015) and San Francisco (2008, 2009, 2010, 2011)
- Faculty Advisor, Alpha Kappa Psi trip to visit Warren Buffett (2011, 2013)
- Served as Judge for the Duff and Phelps YOUniversity Deal Challenge (2010, 2011)
- Served as Judge for the MBA.PM Pre-Fall Intensive Case Competition (2010, 2011)
- FBE Representative Committee on Clinical Faculty (2011)
- Served on the Strategic Planning Committee, Trojan Family subcommittee and UG Team on Globalization, (2011)
- Served on the FBE Department Chair Search Committee (2010)
- Served on the Undergraduate Curriculum Revision Task Force (2009)
- Faculty Advisor to Trojan Investing Society and Trojan Consulting Group
- FBE Undergraduate Faculty Elective Advisor
- Faculty Cohort Mentor, Undergraduate Program
- Assistant Chair, FBE Department, under Tom Gilligan, Kevin Murphy, Ayse Imrohroglu
- Member of USC Associates (2000-2006)

### **Publications**

#### **Textbooks and Case Studies**

Contributor to “*Valuation: The Art and Science of Making Strategic Investments*,” Sheridan Titman and John Martin, publisher: Addison Wesley, 1/e 2007; 2/e August 2010, 3/e September 2015.

- Authored IPO and Enterprise DCF mini-cases, conducted accuracy check and authored instructor PowerPoint materials and excel end-of-chapter problem solutions.
- Authored textbook review of 1/e, *Journal of Applied Finance* – Issues 1 & 2, 2009

*CIBER grant recipient: Case Study on Starbucks Asia (2008-2009)*

### **Presentations**

- “Mergers and Acquisitions Market Update” Invited Speaker, *USC Executive Education Recharge Series*, September 2012
- “Global Business Strategies, Innovation and Entrepreneurship” Invited Moderator, *Shanghai Women’s Conference on Global Leadership*, May 2011
- “Capital Budgeting and Value Creation” Invited Speaker, *NBC Universal Divisional CFO Forum*, July/August 2011
- “Best Practices for Teaching CFA Curriculum” Invited Speaker, *CFALA Instructor Dinner*, December 2011
- “The Role of Activist Investors” Invited Moderator (panel included representatives from Morgan Stanley and Oaktree Capital Management), *USC Marshall Undergraduate Student Investment Fund*, March 2010
- “Merger and Acquisitions – Impact of the Financial Crisis” Invited Speaker, *USC Marshall Center for Investment Studies Workshop Speaker Series*, September 2009
- “USC Global Programs” Invited Speaker, *USC Marshall Partners Parents Program*, April 2009
- “Commercial Due Diligence Webinar” Co-Presenter with Deloitte Valuation, *USC Marshall Executive Education*, April 2009
- “Financial Statement Analysis and Valuation Frameworks in Practice” Invited Speaker, *Stradling, Yocca, Carlson & Rauth, Newport Beach California*, April-May, 2008
- “Women in Corporate Finance” Invited Speaker, *Marshall Women’s Leadership Board*, 2007
- “TIS Bulge Bracket Investment Banking Panel,” and “TIS Boutique Investment Banking Panel,” Annual Invited Moderator, *Trojan Investing Society*, 2003-Present

### **Personal**

- Married to Tom Plotts, VP Finance & CFO at Los Angeles Biomedical Research Institute; two children: Thomas (11) and Quincy (10)