

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
3670 Trousdale Parkway, Ste. 308, Los Angeles, CA 90089
Office Hoffman Hall 221 e-mail: plotts@marshall.usc.edu

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

<i>Associate Professor of Clinical Finance and Business Economics</i>	2014-present
<i>Assistant Professor of Clinical Finance and Business Economics</i>	2006-2014
<i>Lecturer, Assistant Department Chair, Finance and Business Economics</i>	2003-2006
<i>Part-Time Lecturer</i>	2002

University of Melbourne, Melbourne Business School

<i>Adjunct/Visitor, Executive MBA Program</i>	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

- Eight 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)
- Honored Speaker, USC Society of Trojan Women “Last Lecture” (June 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 119 courses and 7,102 students)

GSBA 571, Strategic Management and Finance, Global EMBA USC Marshall/Shanghai Jiaotong University - Theme 8a Finance, Co-taught with Dr. Arvind Bhambri, 2009-2016.

GSBA 561, Evaluating Market Performance, Financial Management Executive MBA Los Angeles and San Diego Theme 2 Finance, 2009-2016.

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

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, 2017

- 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.

University of Melbourne, Melbourne Business School, Australia

Financial Management (Core EMBA) and Mergers and Acquisitions (2nd Year EMBA) 2008

CFA® Review Program Level II - Equity Asset Valuation 2009-present

USC Masters in Medical Management Program 2012-present

USC Marshall Summer Business Program 2013

USC Marshall Summer Exploring Entrepreneurship Program 2016-present

USC Marshall Masters in Business Veterans Program 2013-present

Professional and Administrative Service

- Co-chair FBE Department Clinical Faculty Search Committee
- BUAD 306 Core Coordinator 2017-present
- Serve as the FBE representative on the USC Committee on Communication 2013-present
- Faculty Advisor, Trojan Investing Society 2003-present
- Faculty Advisor, Smart Women Securities 2017-present
- Faculty Advisor, SC Venture Capital Club 2016-present
- Faculty Advisor, Trojan Consulting Group 2014-present
- Served on USC Marshall Executive Education Task Force to develop a Master of Science in Food Industry Management and Leadership
- Served on EMBA Internal Review Committee 2017
- 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 and Hong Kong 2016
- Served on the USC Committee on Non-Tenure Track Faculty Affairs 2014-2015
- Served on the USC Marshall Graduate Instruction Committee 2014-2015
- Selected by USC Marshall 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 and Judge, Duff & Phelps Youniversity Deal Challenge (2010-present).
- Co-Faculty Advisor to the Marshall CFA Investment Challenge Team (2009-2010); placed 2nd (2010-2011) placed 1st.
- Faculty Advisor Marshall Case Team (2008-present); coached Marshall teams for Australia AUBCC (2017), Brazil (2014), Marshall International Case Competition (MICC 2013 – finalist), Auckland Champions Trophy (2010-placed 3rd) and 2012, Thamassat University Business Challenge (2011), Copenhagen Business School Case Competition (2011, 2016), McCombs International Business Challenge (MIBC University of Texas 2008).
- Faculty Advisor, Wall Street Journal and Nationwide BizQuiz Competition Team, 2007 (placed 2nd).
- 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 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, 2017)
- Served on the Undergraduate Curriculum Revision Task Force (2009)
- FBE Undergraduate and MBA Faculty Elective Advisor
- Faculty Cohort Mentor, Undergraduate Program

JULIA PLOTTS
USC MARSHALL SCHOOL OF BUSINESS

- Assistant Chair, FBE Department, under Tom Gilligan, Kevin Murphy, Ayse Imrohorglu
- Member of Town and Gown (2016-present)
- Member, USC Caruso Catholic Center, Newman Guild (2017-present)
- 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

- “Last Lecture” Invited Speaker, *USC Society of Trojan Women* (June 2016)
- “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, CFO at EOS Biosciences; two children: Thomas and Quincy