

# **JULIA GARDNER PLOTTS**

Professor of Clinical Finance and Business Economics  
Academic Director, MS Finance Program  
Department of Finance and Business Economics  
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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**

<i>Academic Director, MS Finance Program</i>	2020-present
<i>Professor of Clinical Finance and Business Economics</i>	2020-present
<i>Associate Professor of Clinical Finance and Business Economics</i>	2014-2020
<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>	2008
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## **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, Government Relations Group	1998
Davis Polk & Wardwell, Financial Institutions Group	1995-1998
U.S. House of Representatives, Committee on Banking & Financial Services	1995
California Governor Pete Wilson, Los Angeles Office	1994

## **Honors & Awards**

- Thirteen-Time Recipient of the USC Marshall Golden Apple Teaching Award
  - Finance & Business Economics – MBA.PM Graduate Program Core (2013)
  - IBEAR MBA program (2012, 2019)
  - Undergraduate Program (2005, 2007, 2010, 2012, 2014, 2016, 2018)
  - Undergraduate Program – Mentoring (2019)
  - MS Finance Program (2021)
  - MBV Program (2023)
- MSF Diamond Award for Mentoring (2022)
- 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)

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- 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)

**Select Contributions - MSF Program Academic Director**

- Led the program through a significant growth period starting in 2020. The program doubled in size (120 total) and shifted to a fall start (16 months over three-semesters). Hired new associate directors and student program assistants to support this growth.
- Revamped admissions operations process to handle high volume of applications. Manage admissions, student advising and programming in-house.
- Completed a curriculum revision requiring a new business communication course and enabling increased flexibility with electives to allow specialization in different areas of finance.
- Pursued a strategy to increase the growth and prominence of the Progressive Degree Program (PDP).

**Teaching**

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

**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 and FBE 590**, Directed Research, 2003-present

- Serve as advisor to approximately 2-3 students each academic year for directed research

**BUAD 215 and 306**, Business Finance (core corporate finance course), 2004-2006, 2017

**GSBA 548 (MBA.PM, IBEAR)** Business Finance (core corporate finance course), 2011-2014

- 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 582b, GSBA-582B** The Global Context and International Business, Business Environment and Management Practices in the Pacific Rim, Singapore-Thailand 2017-2020, Melbourne 2023 (MBA.PM 2<sup>nd</sup> year core – Global Business)

**BUAD 104 and 101** Learning about International Commerce: Hong Kong 2008-2009; Sydney 2010-2020, Global Leadership Program Sydney 2023 (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 (2<sup>nd</sup> Year EMBA) 2008

CFA® Review Program Level II - Equity Asset Valuation 2009-2011

USC Masters in Medical Management Program 2012-2019

USC Marshall Summer Exploring Entrepreneurship Program 2016-present

USC Marshall Masters in Business Veterans Program 2013-present

USC Food Industry Management Program 2018-present

### **Professional and Administrative Service**

- Serve on Dean Garrett's Global Advisory Group (2022-present)
- FBE APR Committee (2022, 2023)
- Member, USC Marshall International Women's Day Planning Committee (2020-present)
- Co-chair FBE Department Clinical Faculty/Adjunct Search Committee (2014-2020)
- Served on the FBE Department Chair Search Committee (2010, 2017, 2020)
- BUAD 306 Core Coordinator 2017-2020
- 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 2016-2019
- 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 Subcommittee 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

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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 2<sup>nd</sup> (2010-2011) placed 1<sup>st</sup>.
- Faculty Advisor Marshall Case Team (2008-present); coached Marshall teams for Budapest (2019-placed 2nd), Copenhagen Business School (2018), UT Austin Women's Case Competition (2018), Australia AUBCC (2017), Brazil (2014), Marshall International Case Competition (MICC 2013 – finalist), Auckland Champions Trophy (2010-placed 3<sup>rd</sup>) and 2012, Thammasat 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 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 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 Undergraduate Curriculum Revision Task Force (2009)
- FBE Undergraduate and MBA Faculty Elective Advisor
- Faculty Cohort Mentor, Undergraduate Program
- Assistant Chair, FBE Department, under Tom Gilligan, Kevin Murphy, Ayse Imrohorglu
- Member of Town & Gown of USC, a non-profit philanthropic organization whose purpose is to support USC through scholarships for students, building and campus enhancements, and cultural programs - (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)*

*RTPC Professional Externship grant recipient (2023)*

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**Presentations**

- “Keynote Speaker,” Explore USC (April 2023)
- “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; two children: Thomas and Quincy
- Serve as an elected member of the Board of Directors of the Jack Kramer Club, 2018-2020, Served as Board Secretary (elected officer position) 2018-2019.