

Summer K. Lee

Shidler College of Business
University of Hawai'i at Mānoa
2404 Maile Way
Honolulu, HI 96822
Summer.lee@hawaii.edu

EDUCATION

Doctor of Philosophy Business Administration (Finance)	University of Hawai'i, Mānoa Honolulu, HI	August 2024
Certificate in Measurement & Statistics Department of Educational Psychology	University of Hawai'i, Mānoa Honolulu, HI	January 2023
Master of Science Major: Personal Financial Planning	College for Financial Planning Centennial, CO	April 2010
Bachelor of Arts Major: Biology Minor: History	University of Hawai'i, Mānoa Honolulu, HI	May 2004

TEACHING EXPERIENCE

Applied Math in Business (Two Sections)	Spring 2024
Personal Finance	Spring 2024
Applied Math in Business (Two Sections)	Fall 2023
Business Finance	Summer 2022
Economic and Financial Environment of Global Business	Fall 2021
Principles of Real Estate (Co-Taught)	Spring 2021
Real Estate & Environmental Law (Co-Taught)	Spring 2021
Real Estate Appraisal/Analysis (Co-Taught)	Spring 2021
Real Estate Finance & Investment (Co-Taught)	Spring 2021
Economic and Financial Environment of Global Business	Spring 2020
<i>(All classes taught at UHM Shidler College of Business)</i>	

Teaching Assistant

Shidler College of Business, University of Hawai'i at Mānoa

- Dr. Rosita Chang 2019-2023
- Personal Financial Planning 2019-2023
- Advanced Topics in Finance

Shidler College of Business, University of Hawai'i at Mānoa

- Dr. S. Ghon Rhee
- Business Finance Spring 2023

RESEARCH EXPERIENCE

Working Paper

“Rank and Sign Momentum in Japan” (Job Market Paper)

- Committee: Dr. S. Ghon Rhee (Chair), Dr. Wei Huang, Dr. Jenny Teruya, Dr. Qianqiu Liu, Dr. Min Liu (EDEP)

Research Assistant

2019-2020

Shidler College of Business, University of Hawaii at Mānoa

- Assistant to Dr. Nick Ordway
- Focused on Intellectual Property in Asia

HONORS & AWARDS

CFP® Examination

Passed July 2024

HONORS & AWARDS

Shidler PhD Teaching Award

Fall 2022

Frances Davis Award for Excellence in Undergraduate Teaching

Fall 2022
(Nominated)

Associated Chinese University Women Graduate Scholarship

Fall 2020

CONFERENCE ATTENDANCE

Hawai'i Accounting Research Conference

2021, 2022

- Moderator in 2022

EMPLOYMENT

Lee Financial Group Honolulu, HI 2005-2018

- Managed client investment assets
- Served on internal investment committee
- Provided research support to Portfolio Manager
- Attended regular conferences and seminars for continued education

SERVICE

UHM General Education FQ Assessment UH Mānoa Ongoing

- Work with the UHM campus Assessment Coordinator to construct quiz materials allowing the assessment team to analyze student progress and performance for quantitative reasoning.

Graduate Student Organization Representative UH Mānoa Ongoing

- Advocate for my constituents who are graduate students with Shidler

CFA Ethics Challenge Volunteer UHM Shidler College of Business 2019-2021

- Coordinate logistics before the event
- Assist in the setup and implementation the day of the event

Undergraduate Student Mentor UHM Shidler College of Business Spring 2021

- Serve as a mentor for an undergraduate student in the Financial Planning Track
- For FIN 467: Seminar in Financial Planning

Finance Seminar Presenter Lee Financial Group 2005-2018

- 4-6 times a year I would present to a live audience on various financial topics

Alumni Member UHM Campus Center Board 2004-2007

- Assisted with the creation of the Warrior Recreation Center
- Reviewed budget items and helped to construct the Master Plan
- Presented to the UH Board of Regents, and various members of the Senate in Hawaii