

ARVID O. I. HOFFMANN

Curriculum Vitae

Last updated: 12/05/2022

CONTACT DETAILS

The University of Adelaide
Adelaide Business School
Adelaide, South Australia
SA 5005, Australia

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EDUCATION

2007: Ph.D. in Economics and Business (Marketing and Finance), University of Groningen, the Netherlands.

2003: M.Sc. in Business Administration (Marketing and Finance), University of Groningen, the Netherlands.

EMPLOYMENT

2017 – now: Professor of Marketing, University of Adelaide Business School, Australia.

Head of Marketing Discipline / Department Head Marketing (2021 – now).

Higher Degree by Research (HDR) Director / Ph.D. Coordinator (2018 – 2021).

2015 – 2016: Associate Professor of Finance, Maastricht University, the Netherlands.

2007 – 2015: Assistant Professor of Finance, Maastricht University, the Netherlands.

OTHER AFFILIATIONS

2018 – now: ARC Centre of Excellence in Population Ageing Research (CEPAR).

2008 – 2018: Network for Studies on Pensions, Aging and Retirement (Netspar).

VISITING POSITIONS

2014: Visiting Scholar, Aalto University School of Business (Helsinki School of Economics), Finland.

2014: Visiting Scholar, Centre for European Economic Research (ZEW), Germany.

2012: Visiting Scholar, Foster School of Business, University of Washington, United States of America.

2012: Visiting Scholar, Aalto University School of Business (Helsinki School of Economics), Finland.

2011: Visiting Scholar, Leavey School of Business, Santa Clara University, United States of America.

2007: Visiting Scholar, Leavey School of Business, Santa Clara University, United States of America.

RESEARCH OVERVIEW

My research is interdisciplinary and bridges the fields of marketing and finance. As a primary research focus, I seek to better understand how individuals make complex financial decisions, such as when choosing investments or planning for retirement. To do so, I integrate theories and methods from marketing as well as finance. In particular, I use survey and experimental data to uncover what individuals think and feel when anticipating or making important financial decisions and relate this to their actual behavior as revealed by, for example, bank and brokerage data. My research informs policy makers and practitioners how different frames or simple primes can “debias” individuals and help improve their decision-making. Recently, I have focused on how to improve the financial decisions and outcomes of vulnerable consumers and the role of increasing financial self-efficacy and goal clarity in improving financial well-being. I am also interested in the interactions between physical, mental, and financial health.

As a secondary research focus, I aim to better understand the interactions between capital and consumption markets. Specifically, I aim to unravel how marketing actions and investments drive financial market outcomes, and vice versa. To do so, I employ a big-data approach combining primary data obtained from textual analysis of firms’ annual reports with secondary data from published financial statements. Recently, I have focused on how shareholder activism influences firms’ marketing strategies in terms of their advertising as well as how advertising provides information not only to consumers in product markets but also investors in financial markets. My research informs (marketing) managers about the strategic importance of marketing assets and actions and how to leverage them for marketplace success and increase the accountability and influence of the marketing function within the firm.

RESEARCH INTERESTS

- consumer financial decision-making
- consumer well-being
- household finance
- marketing strategy
- marketing accountability
- marketing-finance interface

RESEARCH METRICS

Number of Journal Publications and ABDC Ranking				
Total #	A*	A	B	C
41	9 (incl. 3 x FT50)	29	2	1

I have published in leading journals across marketing, finance, and economics. Amongst others, my research has appeared in the *Journal of Marketing*, *Journal of the Academy of Marketing Science*, *International Journal of Research in Marketing*, *Psychology and Marketing*, *Marketing Letters*, *Journal of Consumer Affairs*, *Journal of Business Research*, *Journal of Banking and Finance*, and *Journal of Economic Behavior and Organization*.

Based on Google Scholar, I have an h-index (i10-index) of 21 (31), and my publications have received 2,136 citations.

PUBLICATIONS**Journal Articles:**

- 1 - J. K. Hentzen, **A. O. I. Hoffmann**, R. M. Dolan & E. Pala (forthcoming). "Artificial Intelligence in Customer-Facing Financial Services: A Systematic Literature Review and Agenda for Future Research." Accepted for publication in *International Journal of Bank Marketing*.
- 2 - **Hoffmann, A. O. I.**, D. Plotkina, C. D'Hondt & P. Roger (2022). "Superstitious Beliefs, Locus of Control, and Feeling at Risk in the Face of Covid-19." *Personality and Individual Differences*, 196 (October), 111718.
- 3 - R. Chan, I. Troshani, S. Rao Hill & **A. O. I. Hoffmann** (2022). "Towards an Understanding of Consumers' FinTech Adoption: The Case of Open Banking." *International Journal of Bank Marketing*, 40 (4), 886-917.
- 4 - J. K. Hentzen, **A. O. I. Hoffmann** & R. M. Dolan (2022). "Which Consumers are More Likely to Adopt a Retirement App and How Does it Explain Mobile Technology-Enabled Retirement Engagement?" *International Journal of Consumer Studies* 46 (2), 368-390.
- 5 - C. S. Cheong, **A. O. I. Hoffmann** & R. Zurbrugg (2021). "Tarred with the Same Brush? Advertising Share of Voice and Stock Price Synchronicity." *Journal of Marketing*, 85 (6), 118-140.
- 6 - **Hoffmann, A. O. I.** & D. Plotkina (2021). "Positive Framing When Assessing the Personal Resources to Manage One's Finances Increases Consumers' Retirement Self-Efficacy and Improves Retirement Goal Clarity." *Psychology and Marketing*, 38 (12), 2286-2304.
- 7 - **Hoffmann, A. O. I.** & D. Plotkina (2021). "Let Your Past Define Your Future? How Recalling Successful Financial Experiences Can Increase Beliefs of Self-Efficacy in Financial Planning." *Journal of Consumer Affairs*, 55 (3), 847-871.
- 8 - S. Tomar, H. K. Baker, S. Kumar, & **A. O. I. Hoffmann** (2021). "Psychological Determinants of Retirement Financial Planning Behavior." *Journal of Business Research*, 133 (September), 432-449.
- 9 - **Hoffmann, A. O. I.** & S. Kleimeier (2021). "Financial Disclosure Readability and Innovative Firms' Cost of Debt." *International Review of Finance*, 21 (2), 699-713.
- 10 - **Hoffmann, A. O. I.**, S. J. McNair & J. I. Pallant (2021). "The Financial Vulnerability Trap: Using Latent Transition Analysis to Explore the Dynamics of Consumers' Financial Vulnerability over Time." *European Journal of Marketing*, 55 (6), 1569-1593.
- 11 - **Hoffmann, A. O. I.** & S. Kleimeier (2021). "How do Banks Finance R&D Intensive Firms? The Role of Patents in Overcoming Information Asymmetry." *Finance Research Letters*, 38 (January), 101485.
- 12 - **Hoffmann, A. O. I.** & L. Risse (2020). "Do Good Things Come in Pairs? How Personality Traits Help Explain Individuals' Simultaneous Pursuit of a Healthy Lifestyle and Financially Responsible Behavior." *Journal of Consumer Affairs*, 54 (3), 1082-1120.
- 13 - **Hoffmann, A. O. I.** & D. Plotkina (2020). "Why and When Does Financial Information Affect Retirement Planning Intentions and Which Consumers are More Likely to Act on Them?" *Journal of Business Research*, 117 (September), 411-431.
- 14 - Wies, S., **A. O. I. Hoffmann**, J. Aspara & J. M. E. Pennings (2019). "Can Advertising Investments Counter the Detrimental Effect of Shareholder Complaints on Firm Value?" *Journal of Marketing*, 83 (4), 58-80.
- 15 - **Hoffmann, A. O. I.**, S. Kleimeier, N. Mimioglu & J. M. E. Pennings (2019). "The American Inventors Protection Act: A Natural Experiment on Innovation Disclosure and the Cost of Debt." *International Review of Finance*, 19 (3), 641-651.

- 16 - **Hoffmann, A. O. I.** & S. J. McNair (2019). "How does Consumers' Financial Vulnerability Relate to Positive and Negative Financial Outcomes? The Mediating Role of Individual Psychological Characteristics." *Journal of Consumer Affairs*, 53 (4), 1630-1673.
- 17 - Gerhard, P., Gladstone, J. J. & **A. O. I. Hoffmann** (2018). "Psychological Characteristics and Household Savings Behavior: The Importance of Accounting for Latent Heterogeneity." *Journal of Economic Behavior and Organization*, 148 (April), 66-82.
- 18 - **Hoffmann, A. O. I.** & K. Otteby (2018). "Personal Finance Blogs: Helpful Tool for Consumers with Low Financial Literacy or Preaching to the Choir?" *International Journal of Consumer Studies*, 42 (2), 241-254.
- 19 - **Hoffmann, A. O. I.** & T. Post (2017). "How Return and Risk Experiences Shape Investor Beliefs and Preferences." *Accounting and Finance*, 57 (3), 759-788.
- 20 - Gerhard, P., **A. O. I. Hoffmann** & T. Post (2017). "Past Performance Framing and Investors' Belief Updating: Is Seeing Long-Term Returns Always Associated with Smaller Belief Updates?" *Journal of Behavioral and Experimental Finance*, 15 (September), 38-51.
- 21 - **Hoffmann, A. O. I.** & T. Post (2016). "How Does Investor Confidence Lead to Trading? Linking Investor Return Experiences, Confidence, and Investment Beliefs." *Journal of Behavioral and Experimental Finance*, 12 (December), 64-78.
- 22 - Aspara, J., A. Chakravarti & **A. O. I. Hoffmann** (2015). "Focal versus Background Goals in Consumer Financial Decision-Making: Trading Off Financial Returns for Self-Expression?" *European Journal of Marketing*, 49 (7/8), 1114-1138.
- 23 - **Hoffmann, A. O. I.** & D. Ketteler (2015). "How Experiences with Trading a Company's Stock Influence Customer Attitudes and Purchasing Behavior." *International Journal of Bank Marketing*, 33 (7), 963-992.
- 24 - **Hoffmann, A. O. I.**, T. Post & J. M. E. Pennings (2015). "How Investor Perceptions Drive Actual Trading and Risk-Taking Behavior." *Journal of Behavioral Finance*, 16 (1), 94-103.
- 25 - Aspara, J. & **A. O. I. Hoffmann** (2015). "Cut Your Losses and Let Your Profits Run: How Shifting Feelings of Personal Responsibility Reverses the Disposition Effect." *Journal of Behavioral and Experimental Finance*, 8 (December), 18-24.
- 26 - Aspara, J. & **A. O. I. Hoffmann** (2015). "Selling Losers and Keeping Winners: How (Savings) Goal Dynamics Predict a Reversal of the Disposition Effect." *Marketing Letters*, 26 (2), 201-211.
- 27 - **Hoffmann, A. O. I.** & T. Post (2014). "Self-Attribution Bias in Consumer Financial Decision-Making: How Investment Returns Affect Individuals' Belief in Skill." *Journal of Behavioral and Experimental Economics*, 52 (October), 23-28.
- 28 - **Hoffmann, A. O. I.** & H. Shefrin (2014). "Technical Analysis and Individual Investors." *Journal of Economic Behavior and Organization*, 107 (November), 487-511.
- 29 - **Hoffmann, A. O. I.**, S. F. Henry & N. Kalogeras (2013). "Aspirations as Reference Points: An Experimental Investigation of Risk Behavior over Time." *Theory and Decision*, 75 (2), 193-210.
- 30 - Merrin, R. P., **A. O. I. Hoffmann** & J. M. E. Pennings (2013). "Customer Satisfaction as a Buffer Against Sentimental Stock-Price Corrections." *Marketing Letters*, 24 (1), 13-27.
- 31 - **Hoffmann, A. O. I.**, T. Post & J. M. E. Pennings (2013). "Individual Investor Perceptions and Behavior During the Financial Crisis." *Journal of Banking and Finance*, 37 (1), 60-74.
- 32 - **Hoffmann, A. O. I.** & C. Birnbrich (2012). "The Impact of Fraud Prevention on Bank-Customer Relationships: An Empirical Investigation in Retail Banking." *International Journal of Bank Marketing*, 30 (5), 390-407.

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- 33 - **Hoffmann, A. O. I.** & T. Fischer (2012). "Behavioral Aspects of Covered Call Writing: An Empirical Investigation." *Journal of Behavioral Finance*, 13 (1), 66-79.
- 34 - **Hoffmann, A. O. I.**, H. Franken & T. L. J. Broekhuizen (2012). "Customer Intention to Adopt a Fee-Based Advisory Model: An Empirical Study in Retail Banking." *International Journal of Bank Marketing*, 30 (2), 102-127.
- 35 - Broekhuizen, T. L. J. & **A. O. I. Hoffmann** (2012). "Interactivity Perceptions and Online Newspaper Preference." *Journal of Interactive Advertising*, 12 (2), 29-43.
- 36 - **Hoffmann, A. O. I.**, J. M. E. Pennings & S. Wies. (2011). "Relationship Marketing's Role in Managing the Firm-Investor Dyad." *Journal of Business Research*, 64 (8), 896-903.
- 37 - **Hoffmann, A. O. I.**, A. Tutic & S. Wies (2011). "The Role of Educational Diversity in Investor Relations." *Corporate Communications: An International Journal*, 16 (4), 311-327.
- 38 - **Hoffmann, A. O. I.** & T. L. J. Broekhuizen (2010). "Understanding Investors' Decisions to Purchase Innovative Products: Drivers of Adoption Timing and Range." *International Journal of Research in Marketing*, 27 (4), 342-355.
- 39 - **Hoffmann, A. O. I.** & T. L. J. Broekhuizen (2009). "Susceptibility to and Impact of Interpersonal Influence in an Investment Context." *Journal of the Academy of Marketing Science*, 37 (4), 488-503.
- 40 - **Hoffmann, A. O. I.**, W. Jager & J. H. von Eije (2007). "Social Simulation of Stock Markets: Taking it to the Next Level." *Journal of Artificial Societies and Social Simulation*, 10 (2), 7.
- 41 - **Hoffmann, A. O. I.** (2007). "Individual Investors' Needs and the Investment Professional: Lessons from Marketing." *Journal of Investment Consulting*, 8 (2), 82-93.

Book Chapters:

- 42 - Kalogeras, N., **Hoffmann, A. O. I.** & D. Mahr (2014). "Financial and Non-Financial Attributes of Pension Fund Structures: A Customer Perspective from the Netherlands." In: T. Harrison & H. Estelami (Eds.), *The Routledge Companion to Financial Services Marketing*. New York: Routledge, 101-115.
- 43 - **Hoffmann, A. O. I.**, S. A. Delre, J. H. von Eije & W. Jager (2006). "Artificial Multi-Agent Stock Markets: Simple Strategies, Complex Outcomes." In: C. Bruun (Ed.), *Advances in Artificial Economics: The Economy as a Complex Dynamic System*. Heidelberg: Springer Verlag, 167-176.
- 44 - **Hoffmann, A. O. I.**, S. A. Delre, J. H. von Eije & W. Jager (2005). "Stock Price Dynamics in Artificial Multi-Agent Stock Markets." In: P. Mathieu, B. Beaufils, & O. Brandouy (Eds.), *Artificial Economics: Agent-Based Methods in Finance, Game Theory and Their Applications*. Heidelberg: Springer Verlag, 191-201.

Policy Articles:

- 45 - **Hoffmann, A. O. I.** (2022). "Common Behavioural Biases that Impact Investment Returns." *Investors Voice: Magazine of the Australian Investors Association*, published online at investors.asn.au on March 14, 2022.
- 46 - **Hoffmann, A. O. I.** (2016). "Beleggingspsychologie: Hoe een Duidelijk Beleggingsdoel het Dispositie Effect kan Omdraaien." *VBA Journaal*, 32 (Spring), 44-45. (in Dutch)
- 47 - **Hoffmann, A. O. I.** & T. Post (2014). "Die Selbstüberschätzer: Weshalb Privatanleger selten aus ihren Fehlern lernen." *Ökonomenstimme*, published online at www.oekonomenstimme.org on July 1, 2014. (in German)
- 48 - **Hoffmann, A. O. I.** & T. Post (2012). "Die Renditeillusion: Optimismus und Angst von Privatanlegern." *Ökonomenstimme*, published online at www.oekonomenstimme.org on January 20, 2012. (in German)

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- 49 - **Hoffmann, A. O. I.** & T. Post (2012). “Angst en Optimisme van Particuliere Beleggers.” *Economisch Statistische Berichten*, 97 (4626), 10-12. (in Dutch)
- 50 - **Hoffmann, A. O. I.**, T. Post & J. M. E. Pennings (2011). “Investorenverhalten während der Finanzkrise.” *Die Bank: Zeitschrift für Bankpolitik und Praxis*, 7 (Juli), 30-33. (in German)
- 51 - **Hoffmann, A. O. I.**, T. Post & J. M. E. Pennings (2011). “Particuliere Beleggers en de Financiële Crisis.” *Economisch Statistische Berichten*, 96 (4604), 106-108. (in Dutch)
- 52 - **Hoffmann, A. O. I.**, J. H. von Eije & W. Jager (2008). “De Beïnvloedbaarheid van Beleggers.” *Maandblad voor Accountancy en Bedrijfseconomie*, Januari/Februari, 62-71. (in Dutch)

Working Papers:

- 1 - Wies, S., J. Derwall, **A. O. I. Hoffmann** & J. M. E. Pennings. “Insider Trading and Firm Innovation.”
- 2 - P. Gerrans, **A. O. I. Hoffmann**, S. J. McNair & J. I. Pallant. “Latent Heterogeneity in Financial Education Effects.”
- 3 - Christoffersen, B., **A. O. I. Hoffmann**, Z. Iliewa & L. Jaroszek. “Experiential Learning by Finance Professionals.”
- 4 - Hentzen, J., **A. O. I. Hoffmann** & R. Dolan. “The Retirement Ecosystem.”
- 5 - Schomburgk, L. & **A. O. I. Hoffmann**. “Mindfulness and Consumer Financial Decision-Making.”
- 6 - **Hoffmann, A. O. I.**, D. Plotkina, M. H. Broihanne, A. S. Goeritz & S. Kleimeier. “Well-Being and COVID-19.”
- 7 - P. Roger, C. D’Hondt, D. Plotkina & **A. O. I. Hoffmann**. “Number Preferences of Lottery Players.”

INVITED TALKS

2022: Erasmus University Rotterdam: Research Symposium on The Spillover Effect of Crises (keynote speaker), Maastricht University: Marketing-Finance Conference “The Whole is Greater Than the Sum of Its Parts” (keynote speaker).

2021: University of Western Australia (UWA) Business School.

2020: ARC Centre of Excellence in Population Ageing Research (CEPAR) at University of New South Wales (UNSW).

2019: Auckland University of Technology (AUT).

2018: University of Western Australia (UWA) Business School, Centre for Global Food and Resources at University of Adelaide, University of Queensland (UQ) Business School, CESifo Venice Summer Institute Workshop on Expectation Formation,* ASIC Research Forum: Building Financial Capabilities Together.

2017: University of Melbourne, Queensland University of Technology (QUT) Business School, Melbourne Institute of Applied Economic and Social Research, University of Adelaide, Royal Melbourne Institute of Technology (RMIT), Flinders University College of Business, Government, and Law, SAFE Household Finance Workshop at Goethe University Frankfurt.*

2016: Joint Research Centre of the European Commission (JRC) at Ispra, Tilburg University,* Centre for European Economic Research (ZEW),* Federal Reserve Bank of New York: Workshop on Subjective Expectations.*

2015: Centre for Decision Research at Leeds University Business School, University of Southampton Business School, University of East Anglia, University of Kent,* University of Mannheim.*

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2014: Ghent University, Goethe University Frankfurt, University of Münster,* Aalto University, Netherlands Authority for the Financial Markets (AFM: Autoriteit Financiële Markten), University of Mannheim, Centre for European Economic Research (ZEW).

2013: Warwick Business School, University of Münster, University of Stirling,* Sauder School of Business,* Foster School of Business,* Individual Finance and Insurance Decisions Centre (IFID) at University of Toronto,* Ludwig-Maximilians-Universität München.*

2012: Aalto University, Goethe University Frankfurt,* University of Münster,* University of Amsterdam.*

2011: Santa Clara University, Deutsche Bundesbank,* ESMT,* University of New South Wales.*

2010: INSEAD,* IESEG School of Management.*

2009: Bocconi University.*

2007: Maastricht University, University of Groningen.

* indicates presentation by co-author

CONFERENCE ACTIVITY

Conference Organization:

2016: Special interest group at EMAC conference: “The Marketing-Finance Interface: Interactions between Capital and Consumption Markets.”

2015: Marketing-Finance conference at Maastricht University: “The Whole is Greater Than the Sum of Its Parts III.”

2013: Marketing-Finance conference at Maastricht University: “The Whole is Greater Than the Sum of Its Parts II.”

2012: Special interest group at EMAC conference: “Consumer Financial Decision-Making.”

2010: Special session at Marketing Science conference: “Identifying Marketing Actions that Drive Financial Performance.”

2008: Marketing-Finance conference at Maastricht University: “The Whole is Greater Than the Sum of Its Parts.”

2007: Behavioral Finance conference at University of Groningen: “Investor Behavior and Stock Market Dynamics.”

Conference Presentations:

2021: Australian & New Zealand Marketing Academy (ANZMAC).*

2019: Academy of Marketing Science Conference,* Academy of Marketing Science World Marketing Congress,* Australian & New Zealand Marketing Academy (ANZMAC), Australasian Finance and Banking Conference (AFBC) at University of New South Wales.

2018: Annual Colloquium on Pensions and Retirement Research at University of New South Wales, International Family Enterprise Research Academy Annual Conference,* Society of the Advancement of Behavioral Economics (SABE) and International Association for Research in Economic Psychology (IAREP) Conference,* VU University Amsterdam: Research in Behavioural Finance Conference,* Australian & New Zealand Marketing Academy (ANZMAC).

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2017: American Marketing Association (AMA) Winter Conference,* Thurgau Experimental Economics Meeting: Biased Beliefs: Cognitive Limitations and Preferences over Beliefs,* Queen Mary University of London: Behavioral Finance Working Group Conference,* Subjective Probability, Utility and Decision Making (SPUDM) Conference,* Accounting & Finance Association of Australia and New Zealand (AFAANZ) Conference, Society of the Advancement of Behavioral Economics (SABE) Conference,* Society for Judgment and Decision Making (SJDM) Conference,* Congress of the European Economic Association (EEA),* Annual Meeting of the Financial Management Association(FMA),* Australian & New Zealand Marketing Academy (ANZMAC), Paris Finance Meeting (EUROFIDAI-AFFI-ESSEC),* Australasian Finance and Banking Conference (AFBC) at University of New South Wales.

2016: Netspar International Pension Workshop,* Paris Finance Meeting (EUROFIDAI-AFFI-ESSEC),* Experimental Finance Conference in Mannheim/St. Martin,* SERVSIG 2016 Conference,* SABE/IAREP Conference on Behavioural Insights in Research and Policy Making at Wageningen University,* Annual European Conference of the Financial Management Association (FMA),* European Marketing Academy Conference (EMAC),* Maastricht Behavioral and Experimental Economics Symposium (M-BEES),* VU University Amsterdam: Research in Behavioural Finance Conference, Nordic Finance Network (NFN) Young Scholars Nordic Finance Workshop,* Australasian Finance and Banking Conference (AFBC) at University of New South Wales.

2015: Network for Integrated Behavioural Science (NIBS) Behavioural Science and Policy Conference, European Marketing Academy Conference (EMAC), Tilburg Institute for Behavioral Economics Research (TIBER): Symposium on Psychology and Economics,* Congress of the European Economic Association (EEA),* Netspar Pension Day.*

2014: University of Essex: ESRC Research Centre on Micro-Social Change (MiSoC) Workshop on Subjective Expectations and Probabilities in Economics and Psychology, Annual European Conference of the Financial Management Association (FMA),* Centre for Financial Research Cologne: Colloquium on Financial Markets,* Boulder Summer Conference on Consumer Financial Decision Making,* University of Nottingham: Network for Integrated Behavioural Science (NIBS) Workshop on Household Financial Decision Making and Behaviour in Financial Markets, Congress of the European Economic Association (EEA),* Tilburg Institute for Behavioral Economics Research (TIBER): Symposium on Psychology and Economics, Erasmus University: Research in Behavioural Finance Conference, Annual Meeting of the German Finance Association (DGF).

2013: European Retail Investment Conference, Marketing Strategy Meets Wall Street III Conference,* Annual European Conference of the Financial Management Association (FMA), Tilburg Institute for Behavioral Economics Research (TIBER): Symposium on Psychology and Economics.

2012: Centre for Financial Research Cologne: Colloquium on Financial Markets,* Centre for European Economic Research (ZEW): Conference on The Role of Expectations in Financial Markets, Academy of Marketing Science Conference,* European Marketing Academy Conference (EMAC), INFORMS Marketing Science Conference,* Cass Business School: Behavioral Finance Working Group Conference,* Netspar International Pension Workshop,* Boulder Summer Conference on Consumer Financial Decision Making, International Conference on Applied Financial Economics (AFE),* Annual Meeting of the German Finance Association (DGF),* Annual Meeting of the Financial Management Association (FMA).*

2011: European Retail Investment Conference, JOIM Spring Conference,* Queen's University: Annual Behavioral Finance Conference,* Cass Business School: Behavioral Finance Working Group Conference,* Marketing Strategy Meets Wall Street II Conference,* INFORMS Marketing Science Conference,* Congress of the European Economic Association (EEA),* Annual Meeting of the German Finance Association (DGF), Netspar Pension Day, Karlsruhe Institute of Technology: Symposium on Finance, Banking, and Insurance.*

2010: Netspar Theme Conference: Balance Sheet Management,* INFORMS Marketing Science Conference, SAVE Conference,* European Marketing Academy Conference (EMAC).

2009: Netspar Pension Day, Marketing Strategy Meets Wall Street Conference, European Marketing Academy Conference (EMAC).

2008: Netspar Pension Workshop, EFMA Conference, INFORMS Marketing Science Conference, European Marketing Academy Conference (EMAC).

2007: Annual Conference of the European Social Simulation Association.*

2006: Artificial Economics Conference, World Conference on Social Simulation.

2005: Artificial Economics Conference.

2004: Annual Conference of the European Social Simulation Association.

* indicates presentation by co-author

Conference Discussions:

2020: Academic mentor in Doctoral Colloquium of the Australian & New Zealand Marketing Academy (ANZMAC).

2019: Australasian Finance and Banking Conference at University of New South Wales.

2018: Academic mentor in Doctoral Colloquium of the Australian & New Zealand Marketing Academy (ANZMAC).

2017: Accounting & Finance Association of Australia and New Zealand (AFAANZ) Conference.

2016: Australasian Finance and Banking Conference at University of New South Wales.

2014: Netspar Meeting at PGGM on Pension Awareness, Information and Choices (Netspar bijeenkomst bij PGGM over onderwerp "Pensioenbewustzijn, Informatie en Gemaakte Keuzes"), Netspar International Pension Workshop, Annual Meeting of the German Finance Association (DGF).

2013: European Retail Investment Conference, Annual European Conference of the Financial Management Association (FMA), Marketing Strategy Meets Wall Street III Conference.

2012: Netspar International Pension Workshop, Annual Meeting of the German Finance Association (DGF), Netspar Theme Conference: Field Experiments and Research on Pensions, Aging and Retirement, European Retail Investment Conference.

2010: Netspar Panel Discussion, Netspar Pension Day.

ACADEMIC AND PROFESSIONAL SERVICE

Ad-Hoc Reviewer:

- *American Economic Review*

- *American Economic Review: Insights*

- *Accounting and Finance*

- *Applied Finance Letters*

- *Applied Research in Quality of Life*

- *Australasian Marketing Journal*

- *Australian Journal of Management*

- *Cogent Psychology*

- *Corporate Communications: An International Journal*
- *Economic Analysis and Policy*
- *Educational Gerontology*
- *Emerging Markets Finance and Trade*
- *European Journal of Finance*
- *Finance Research Letters*
- *Financial Markets and Portfolio Management*
- *Frontiers in Psychology*
- *International Journal of Bank Marketing*
- *International Journal of Consumer Studies*
- *International Journal of Information Technology & Decision Making*
- *International Journal of Research in Marketing*
- *International Review of Economics and Finance*
- *International Review of Finance*
- *International Review of Financial Analysis*
- *Journal of the Academy of Marketing Science*
- *Journal of Artificial Societies and Social Simulation*
- *Journal of Banking and Finance*
- *Journal of Behavioral and Experimental Economics*
- *Journal of Behavioral and Experimental Finance*
- *Journal of Behavioral Finance*
- *Journal of Business Research*
- *Journal of Consumer Affairs*
- *Journal of Consumer Policy*
- *Journal of Economic Behavior and Organization*
- *Journal of Economic Psychology*
- *Journal of Empirical Finance*
- *Journal of Experimental Psychology: Applied*
- *Journal of Financial Services Marketing*
- *Journal of International Marketing*

- *Journal of Services Marketing*
- *Managerial Finance*
- *Managing Service Quality*
- *North American Journal of Economics and Finance*
- *PLOS ONE*
- *Research in International Business and Finance*
- *Review of Behavioral Finance*
- *Review of Finance*
- *Review of Financial Studies*
- *Sage Open*

Editorial Review Boards:

- *International Journal of Bank Marketing* (2013 - 2016)

Editorial Responsibilities:

- Associate Editor, *European Journal of Marketing*, (2018 – now)
- Associate Editor, *European Journal of Finance*, (2017 – 2019)

Grant Review Committees:

- External assessor, Personal Research Funding Scheme, Estonian Research Council (ETAg) (2017).
- External assessor, Insight Grants Program, Social Sciences and Humanities Research Council of Canada (2016).
- External assessor, Personal Research Funding Scheme, Estonian Research Council (ETAg) (2016).
- External assessor, Expert Panel Economics, Business Economics, and Management, Research Foundation - Flanders (2016).
- External assessor, Expert Panel Economics, Business Economics, and Management, Research Foundation - Flanders (2015).
- External assessor, Insight Grants Program, Social Sciences and Humanities Research Council of Canada (2015).
- External assessor, Insight Grants Program, Social Sciences and Humanities Research Council of Canada (2014).
- External assessor, Insight Grants Program, Social Sciences and Humanities Research Council of Canada (2013).

Conference Program Committees:

- Australian & New Zealand Marketing Academy (ANZMAC) (2021)

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- European Marketing Academy Conference (EMAC) (2019)
- Academy of Marketing Science Annual Conference (2018)
- American Marketing Association (AMA) Summer Conference (2018)
- European Marketing Academy Conference (EMAC) (2018)
- American Marketing Association (AMA) Winter Conference (2018)
- Australian & New Zealand Marketing Academy (ANZMAC) (2017)
- American Marketing Association (AMA) Summer Conference (2017)
- Annual Meeting of the Accounting & Finance Association of Australia and New Zealand (AFAANZ) (2017)
- Annual Conference of the Swiss Society for Financial Market Research (SGF) (2017)
- European Marketing Academy Conference (EMAC) (2017)
- Annual Meeting of the Accounting & Finance Association of Australia and New Zealand (AFAANZ) (2016)
- Annual European Conference of the Financial Management Association (FMA) (2016)
- European Marketing Academy Conference (EMAC) (2016)
- Annual Meeting of the German Finance Association (DGF) (2015)
- Annual European Conference of the Financial Management Association (FMA) (2015)
- European Marketing Academy Conference (EMAC) (2015)
- Annual European Conference of the Financial Management Association (FMA) (2014)
- European Marketing Academy Conference (EMAC) (2014)
- Marketing Strategy Meets Wall Street III Conference (2013)
- American Marketing Association (AMA) Summer Marketing Educators' Conference (2013)
- Annual European Conference of the Financial Management Association (FMA) (2013)
- European Marketing Academy Conference (EMAC) (2013)
- Annual Meeting of the German Finance Association (DGF) (2011)

Other Reviewing Activity:

- External expert evaluating candidate for professorial appointment at research-intensive university in Estonia (2022).
- Thesis review panel for AACSB-NVAO accreditation of a research-intensive university in the Netherlands (2022).
- External referee for academic promotion application at a Russel Group university in the United Kingdom (2021).
- External referee for lead applicant in Leverhulme Small Research Grants scheme of the British Academy (2021).
- External referee for academic promotion application at a research-intensive university in Australia (2021).

- External referee for PhD project proposal at Wageningen University School of Social Sciences (WASS) (2019).
- External referee for academic promotion application at a research-intensive university in New Zealand (2019).
- Peer reviewer for Australian Research Council's Excellence in Research for Australia (ERA) framework (2018).
- External referee for academic promotion application at a research-intensive university in Australia (2018).

DEPARTMENTAL AND UNIVERSITY SERVICE

University of Adelaide:

- Head of Marketing Discipline / Department Head Marketing (2021 – now).
- Member of Adelaide Business School Executive Committee (2021 – now).
- Member of Higher Degree by Research (HDR) / Ph.D. Committee (2018 – 2021).
- Member of Research Committee of Adelaide Business School (2018 – 2021).
- Higher Degree by Research (HDR) Director / Ph.D. Coordinator (2018 – 2021).
- Member of School of Marketing and Management Research Committee (2017).

Maastricht University:

- Director of M.Sc. program in International Business: Marketing-Finance (2015 – 2016).
- Member of Educational Program Committee of School of Business and Economics (2013 – 2016).
- Member of Editorial Board of Maastricht University Magazine (2011 – 2014).
- Founding Co-Director of Marketing-Finance Research Lab (2009 – 2016).
- Founding Co-Director of Marketing-Finance Company Circle (2008 – 2016).
- Founding Co-Director of M.Sc. program in International Business: Marketing-Finance (2008 – 2015).

THESIS ADVISING AND EXAMINING

Ph.D. Thesis Advising:

- Lachlan Schomburgk (University of Adelaide): committee chair (“principal supervisor”).
- Dietrich Silber (University of Adelaide): committee chair (“principal supervisor”).
- Janin Hentzen (University of Adelaide): committee chair (“principal supervisor”).
- Ayoosha Saleem (University of Adelaide): committee chair (“principal supervisor”). Thesis title: “Advancing the Understanding of Family Businesses’ Psychological Foundations” (completed in 2021).

- Shujie Liu (University of Adelaide): committee co-chair (“co-supervisor”). Thesis title: “Advertising’s Financial Market Outcomes” (completed in 2021).

- Patrick Gerhard (Maastricht University): committee co-chair (“co-supervisor”). Thesis title: “Essays on Financial Decision Making: How Households Save, Invest, and Dissave” (completed in 2019).

- Simone Wies (Maastricht University): committee co-chair (“co-supervisor”). Thesis title: “Stock Market Dynamics of Marketing Decision-Making” (completed in 2013).

Ph.D. Thesis Examining:

- Pieter Verhallen (Maastricht University). Thesis title: “No, They Didn’t? Oh, They Did! Advancing Insights on Social Norm Interventions in Consumer Financial Decision-Making” (2021).

- Ron van Schie (Erasmus University Rotterdam). Thesis title: “Planning for Retirement: Save More or Retire Later?” (2017).*

- Nicolas Dierick (Ghent University). Thesis title: “Using Transaction Data to Examine the Drivers of Investment Behavior for Different Groups of Investors” (2016).

- Benjamin (Bing) Radoc (University of East Anglia). Thesis title: “Validating the Predictions of Case-Based Decision Theory” (2015).*

- Alex Klein (Nyenrode Business University). Thesis title: “Marketing As Value-Leverage: Does Marketing Contribute to Firm Performance via Process Improvement?” (2015).*

- Mitch Tolo (Aalto University School of Business). Thesis title: “Marketing Investment Selection and Effectiveness in Growth-Oriented Private Firms: Source of Capital and Market-Based Assets as Contingencies” (2014).*

- Sajid Chaudry (Maastricht University). Thesis title: “Essays on International Banking and (In)Stability in Financial Markets” (2013).

- Nikos Kalogeras (Maastricht University). Thesis title: “Essays on Individual Decision Making: With Special References to Agribusiness & Food Markets” (2011).

* indicates acting as external pre-examiner of thesis in addition to acting as committee member during public defense.

M.Phil. Thesis Advising:

- Gary He (University of Adelaide): committee co-chair (“co-supervisor”).

- Rebecca Chan (University of Adelaide): committee co-chair (“co-supervisor”). Thesis title: “Open Banking: Does it Open Up a New Way of Banking?” (completed in 2020).

M.Sc. Thesis Advising:

- Katarina Otteby (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Antecedents of Consumer Intention to use Personal Finance Blogs and their Perceived Helpfulness” (completed in 2016).

- Mark Cosar (Maastricht University): committee chair (“principal supervisor”). Thesis title: “The Influence of Investor Wealth, Financial Literacy and Investing Experience on Individual Investor’s Preference for Non-Financial Benefits from Investing” (completed in 2016).
- Ben te Beek (Maastricht University): committee chair (“principal supervisor”). Thesis title: “A Guide to Writing Management Earnings Forecasts” (completed in 2015).
- Jorien Brekelmans (Maastricht University): committee chair (“principal supervisor”). Thesis title: “What is the Impact of CEO Overconfidence on Shareholder Value?” (completed in 2015).
- Rik van Amelsfoort (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Myopic Loss Aversion: The Effect of Experimental Design—The Difference Between the Additive and the Multiplicative Approach” (completed in 2015).
- Ioannis Avramidis (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Impact Investing at Dutch Pension Funds” (completed in 2015).
- Inga Minakova (Maastricht University): committee chair (“principal supervisor”). Thesis title: “On the Acceptance of Social Trading and Investment Networks” (completed in 2015).
- Edo Heijnen (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Student Loans and Spending Behavior” (completed in 2015).
- Kendra Teesdale (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Branding Diversification: Portfolio Strategy Effects on Firm Performance in the Consumer Goods Industry” (completed in 2014).
- Lena Bogatz (Maastricht University): committee chair (“principal supervisor”). Thesis title: “The Virtual Money Bitcoin, its Relationship to the US Stock Market and its Investment Opportunities” (completed in 2014).
- Dana Ketteler (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Emotions in (Financial) Decision-Making: Influence of Trading a Company’s Stock on Investors’ Purchasing Behavior” (completed in 2014).
- Danny Guo (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Social Media and Shareholder Value” (completed in 2013).
- Maria Gross (Maastricht University): committee chair (“principal supervisor”). Thesis title: “The Effect of a Nonconscious Savings Goal on Investment Behavior and the Influence of Propensity to Plan and Self-Control” (completed in 2013).
- Cornelia Birnbrich (Maastricht University): committee chair (“principal supervisor”). Thesis title: “The Impact of Fraud Prevention on Bank-Customer Relationships: An Empirical Study in Retail Banking” (completed in 2012).
- Lisa Engels (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Electronic Word of Mouth on Facebook: Consumer Motivations and the Role of Social Relations” (completed in 2012).
- Nienke Rijpstra (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Comparing Spontaneous and Fertilized Word of Mouth: An Analysis of Customer Referral Value” (completed in 2011).
- Aida Tutic (Maastricht University): committee chair (“principal supervisor”). Thesis title: “The Role of Educational Diversity in Investor Relations” (completed in 2010).
- Heiner Franken (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Determinants of Customer Intention to Adopt a Fee-Based Advisory Model: An Empirical study in Retail Banking” (completed in 2010).
- Tobias Fischer (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Behavioural Aspects of Covered Call Writing: An Empirical Investigation” (completed in 2010).

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Curriculum Vitae

- Sam Henry (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Aspirations and Risk Behavior over Time: An Experimental Investigation” (completed in 2009).
- Simone Wies (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Marketing’s Role in Investor Relations Management” (completed in 2009).
- Riaz Ishaak (University of Groningen): committee chair (“principal supervisor”). Thesis title (in Dutch): “Onderscheidendheid Creëren in een Overvolle Markt” (completed in 2007).
- Wouter Meijer (University of Groningen): committee chair (“principal supervisor”). Thesis title (in Dutch): “All Consumers are Equal, But Some Are More Equal than Others. Een Kwantitatief Onderzoek naar Segmenten van Consumenten ten Aanzien van Gezondheid en Voeding” (completed in 2006).
- Jochem Hes (University of Groningen): committee chair (“principal supervisor”). Thesis title (in Dutch): “Keeping Ahead of the Game: Onderzoek naar Internationale Expansiemogelijkheden voor The Networks” (completed in 2005).
- Roy Sijbom (University of Groningen): committee chair (“principal supervisor”). Thesis title (in Dutch): “Het Ontwikkelen van een Strategisch Marketingplan voor Studentenplein.nl” (completed in 2005).

B.Sc. Honors Thesis Advising:

- Anant Srivastava (University of Adelaide): committee chair (“principal supervisor”). Thesis title: “Gambling and Trading Adverts: A Theoretical Perspective on Attitudinal Shifts” (completed in 2021).
- Lachlan Schomburgk (University of Adelaide): committee chair (“principal supervisor”). Thesis title: “How Mindfulness Alleviates Consumers’ Buy-Now-Pay-Later-Usage and its Association with Financial and Overall Well-Being” (completed in 2021).

B.Sc. Honors Thesis Examining:

- Panayoti Dionysios Psorakis (University of Adelaide). Thesis title: “What is the Role of Organizational Readiness for Market Shaping?” (2021).
- Georgia Wastell (University of Adelaide). Thesis title: “Cancelled Influencers: Investigating Impacts on the Endorsed Brands” (2021).

TEACHING EXPERIENCE

University of Adelaide:

- Understanding Consumers (M.Sc. program, 2017 - now)

Average student evaluation:

6.12 out of 7 (“Overall, I am satisfied with the quality of this course” 1 = strongly disagree, 7 = strongly agree) *

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Curriculum Vitae

- Service Design and Marketing (B.Sc. program, 2019 - now)

Average student evaluation:

6.03 out of 7 (“Overall, I am satisfied with the quality of this course” 1 = strongly disagree, 7 = strongly agree) *

- Services Marketing (B.Sc. program, 2017 - 2018)

Average student evaluation:

6.04 out of 7 (“Overall, I am satisfied with the quality of this course” 1 = strongly disagree, 7 = strongly agree) *

- Contemporary Issues in Marketing (B.Sc. program, 2018 - now). †

- Advanced Marketing Theory (B.Sc. Honors program, 2019 - now). †

Maastricht University:

- Shareholder Value and Market-Based Assets (M.Sc. program, 2008 - 2015)

Average student evaluation:

8.04 out of 10 (“Please give an overall grade for the quality of this course” 1 = very bad, 10 = very good) *

- Behavioral Finance (M.Sc. program, 2007 - 2015)

Average student evaluation:

7.70 out of 10 (“Please give an overall grade for the quality of this course” 1 = very bad, 10 = very good) *

- Behavioral Corporate Finance (Executive MBA program, 2009 - 2016) †

- Financial Markets (M.Phil. program, 2010 - 2016) †

University of Groningen:

- Principles of Marketing (B.Sc. program, 2005 - 2007) †

* Detailed course evaluation available upon request.

† No student evaluation available for this course.

PEDAGOGICAL TRAINING

- 2017: *Learning Analytics* (University of Adelaide)
- 2017: *Supervision of Doctoral Studies* (University of Adelaide)
- 2016: *Aboriginal Cultural Awareness* (University of Adelaide)
- 2016: *Mental Health Awareness* (University of Adelaide)
- 2010: *University Teaching Qualification* (Maastricht University)
- 2008: *Supervision of PhD Students* (Maastricht University)
- 2008: *Problem-Based Learning* (Maastricht University)

CONSULTING EXPERIENCE

- 2019: ASIC (I am a member of ASIC's Financial Capability Research Steering Committee)
- 2019: Dreams Nordic AB (I am a member of Dreams Nordic AB's Scientific Advisory Board)
- 2018: European Commission (I advised the EC about marketing and distance selling of retail financial services)
- 2018: ASIC MoneySmart (I advised ASIC regarding the National Financial Capability Research Roadmap)
- 2016: European Commission (I advised the JRC about behavioral aspects of retail investor decision-making)
- 2015: Fidelity International (I developed an executive teaching program for pension fund board members)
- 2015: Bouwaandeel (I advised Bouwaandeel on marketing aspects of a real-estate crowdfunding platform)
- 2014: ING Private Banking (I advised ING regarding new developments as to private wealth management)
- 2014: Meetinvest AG (I advised Meetinvest regarding the introduction of a financial social media platform)
- 2014: Netherlands Authority for the Financial Markets (I advised AFM on execution-only investor behavior)
- 2014: Deluxe Corporation (I advised Deluxe regarding marketing aspects of a financial service innovation)
- 2011: Deutsche Postbank (I advised Postbank on fraud prevention measures and customer relationships)
- 2010: Sparkasse KölnBonn (I advised Sparkasse about new developments as to financial advice offerings)

HONORS AND AWARDS

- 2022: *Top Cited Article Award* (Journal of Consumer Affairs)
- 2021: *Excellence in Research Award* (University of Adelaide)
- 2021: *Excellence in Interdisciplinary Research Collaboration Award* (University of Adelaide)
- 2019: *Excellence in Research Award* (University of Adelaide)

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Curriculum Vitae

- 2019: *Top Downloaded Article Award* (International Review of Finance)
- 2016: *Outstanding Paper Award* (International Journal of Bank Marketing)
- 2015: *Excellent Graduate Educator Award* (Maastricht University)
- 2014: *Academic Leadership Program "Fast Forward"* (Maastricht University)
- 2013: *Outstanding Paper Award* (International Journal of Bank Marketing)
- 2011: *Academic Leadership Program "Steep Face"* (Maastricht University)
- 2009: *Excellence in Teaching Award* (Maastricht University)

GRANTS AND RESEARCH INCOME

- 2022: *Automotive Product Stewardship* (AUD 2,000) for industry project with the Electric Vehicle Council; Battery Stewardship Council; Tyre Stewardship Australia; Department of Environment, Land, Water, and Planning (State Government of Victoria), and the Department for Energy and Mining (State Government of South Australia).
- 2021: *Special Project Fund Grant* (USD 15,000) from Academic Consortium for the 21st Century (AC21).
- 2017: *Priority Partner Funding* (AUD 5,000) from Faculty of the Professions at University of Adelaide.
- 2008: *Small Scale Research Grant* (EUR 4,000) from Meteor Research School at Maastricht University.

INTERVIEWS AND MEDIA COVERAGE

My research has been featured in articles in international media, including *ABC News, Financial Times, Huffington Post, BBC Capital, Forbes, Bloomberg, Reuters, CNBC, New York Times, Morningstar, The Star Online, The Motley Fool, The Globe and Mail, The Press, Neue Zürcher Zeitung, Handelsblatt, derStandard.at, Het Financieele Dagblad, Algemeen Dagblad, De Telegraaf, NRC Handelsblad, De Volkskrant, De Financiële Telegraaf, BN DeStem.*

LANGUAGES

- Dutch (native)
- English (excellent)
- German (good)