

## Meet Eric Robbins Assistant Teaching Professor in Finance

CFA, CFP®, Penn State Behrend, Black School of Business

Eric Robbins has spent his entire career working with the stock market, managing the invested assets and the retirement income needs of retirees. Partway through a successful wealth management career, he began instructing at Penn State Behrend and soon leaned into his passion for educating others, joining the PSU staff full-time in 2013. Earning both his CFA and CFP along the way, Eric now teaches Investments and Retirement Planning both residentially at Penn State Behrend and online through Penn State World Campus. Additionally, Eric continues to consult for clients of his family-owned wealth management firm on a periodic basis.

### About The University and Program

The Finance program at Penn State Behrend is mapped to the curriculum of the CFA Institute, CAIA, and the CFP Board. The program focuses on experiential learning and using real-world data as much as possible. Students also have access to join the Student Managed Fund, which invests live funds in the stock market under the supervision of faculty. Eric created the core investments class—a curriculum requirement of all Finance majors—and continues to teach it. Penn State Behrend is also the academic home for the Finance major offered through Penn State World Campus.

### The Challenge

“There is a great deal of terminology and a textbook understanding that does not engage students at a deep enough level for learning to last beyond the next exam,” explained Eric.

Finance isn’t always the easiest subject and Eric’s students often found it challenging to make sense of the vast amount of information available. Eric needed a better way to engage students with real-world, hands-on learning experiences.

There was no shortage of great tools though, Eric’s department offered access to twelve Bloomberg Terminals on campus. The issue? Students needed to be physically at a terminal and given many remote students on top of a global pandemic, in person access isn’t an option for everyone.



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### The Solution

Eric was first introduced to YCharts while attending TD Ameritrade's National LINC Conference. After a demo, he quickly saw that YCharts' accessibility and depth & breadth of data would be a game-changer for his students as they explored the vast world of finance.

Eric was most excited about the amount of information available in the tool, and how easy it was to navigate. *"I could see myself using YCharts to show concepts to students live during a class discussion and then further leveraging the tool for their assignments and more targeted exploration,"* said Eric.

The connection with YCharts was formalized when Eric attended Riskalyze's Fearless Investing Summit in 2019. After speaking with the YCharts team and learning of the incentive for students and higher education, Eric was ready to secure YCharts access for his students at Penn State Behrend.



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### The Results

*"YCharts helps my students explore and visualize concepts that we discuss during class sessions. Many of my students spend hours researching investments for personal interest and learn the tool along the way,"* said Eric.

In addition, the onboarding process was seamless according to Eric. He added that the YCharts Customer Success team is always helpful in getting student accounts enabled and answering questions related to the functionality.

Eric uses YCharts data to bring the real world into the classroom. As one example, he instructs his class to look up macroeconomic variables and their historical trends in YCharts. *"They can map the variable on a fundamental chart relative to the S&P 500 Index and visually see the impact. Additionally, I use the portfolio-level statistics in two trading simulations, and I have students write an equity research report while conducting comparative analysis on a stock of their choosing,"* he added. Eric uses YCharts information to further classroom discussions on equity valuation as well.

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YCharts has enabled Eric's students to explore financial concepts at a deeper level, especially during a global pandemic, when students were not able to access the tools offered on campus.

As the semester and coursework progress, the one piece of advice Eric has for his students is to *"Keep learning and be curious in life. There is always something new to learn. Also, focus on gathering facts and try to leave emotions and opinions out of your decision-making process."*

*"YCharts has enabled me to bring theoretical classroom discussion into the real world."* As someone with experience in both the professional (RIA) and educational spaces, Eric has found that YCharts is an incredibly useful tool in the professional world. There is a wealth of information to help make sense of financial markets. As an educator, this is an invaluable experience for students.



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### Success Made with YCharts

Eric Robbins, Assistant Teaching Professor in Finance, CFA, CFP® of Penn State Behrend, Black School of Business leans on YCharts to engage his students in real-world, hands-on activities to explore the vast world of finance.



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