Robert J. Glew, DBA, CFP®, CTFA

Assistant Teaching Professor, Finance

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EDUCATION

2024	D.B.A. in Business Administration, University of Rhode Island
2021	Graduate-level Certificate in Strategic Management, Harvard University Extension School
2015	Financial Planning Certificate Program, Bryant University
2013	American Institute of Banking Personal Trust Diploma, The American Bankers Association
2005	M.B.A., major Finance/minor Operation & Information Management, University of Connecticut
2000	B.S. in Business Administration, major Marketing/minor Psychology, Bryant University

EMPLOYMENT

2026	Assistant Teaching Professor, College of Business, University of Rhode Island
2026	Founder, RJG Wealth Planning LLC

2026 Subject Matter Expert (SME), The American College of Financial Services

2005-2025 Bank of America: AVP/Senior Financial Analyst, Commercial Leasing (05-08), Chairperson/Team Bank of America Rhode Island (07-09), AVP/Client Manager, Premier Banking & Investments (08-09), AVP/Philanthropic Offer, Private Bank (09-13), VP/Philanthropic Team Leader, Private Bank (13-16), Co-Founder, Inter-Generational Employee Network (15-18), SVP/Market Trust Director, Private Bank (16-25)

AWARDS AND HONORS

2024 The Honor Society of Phi Kappa Phi

2018 National Opportunity and Inclusion Award, Bank of America

2017 The President's Volunteer Service Award (Bronze Level)
Recognized for 200 hours of volunteer service

2016 The President's Volunteer Service Award (Bronze Level)
Recognized for 200 hours of volunteer service

2008 The President's Volunteer Service Award (Bronze Level)
Recognized for 200 hours of volunteer service

2007 The President's Volunteer Service Award (Bronze Level)
Recognized for 200 hours of volunteer service

PRESENTATION

1. Applying the theory of planned behavior in estate planning [Presenter], Association for Financial Counseling & Planning Education® (AFCPE®) 2025 Symposium, Phoenix, AZ, November 18- 20, 2025.
2. Money Talks: What Parents Are and Aren't Teaching Kids about Financial Literacy [co-Presenter], Annual URI DBA Scholars Conference 2026, Kingston, RI, October 2-4, 2026.
3. Retirement education and retirement planning: success priming and presentation order as moderators [Presenter], The CFP Board Connections Conference 2026, Las Vegas, NV, October 5-7, 2026.

PUBLICATION

1. Glew, R. J., Djurdjevic, E., Xiao, J. J. (2025). Applying the theory of planned behavior in estate planning. International Journal of Bank Marketing.

PEER REVIEWER

1. Annual DBA Scholars Conference 2026
2. The CFP Board Connections Conference 2026

WORKSHOP

1. Collecting Dissertation Data: Insights, Challenges, and Recommendations [co-Presenter], URI DBA August 2026 Residency, Kingston, RI, August 15-16, 2026.

GRANT REQUESTS SUBMITTED (unfunded)

1. Fidelity Center for Applied Technology 2026, $50,000 (requested)
2. The Retirement Research Foundation, dba RRF Foundation for Aging 2026, $145,024 (requested)
3. The Retirement Research Foundation, dba RRF Foundation for Aging 2026, $95,000 (requested)

PROFESSIONAL CERTIFICATIONS

1. Certified Financial Planner (CFP®)
2. Certified Trust and Financial Advisor (CTFA)

MEMBERSHIP

1. Financial Planning Association of Rhode Island
2. Estate Planning Council of Rhode Island
3. CFA Society Providence
4. American Bankers Association
5. The Honor Society of Phi Kappa Phi