

11/9/2021

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Education: **Isenberg School of Management – University of Massachusetts, Amherst**

- Master of Business Administration, May 2001
 - David Gaunt Scholar
- Bachelor of Business Administration, Accounting, May 1996

Roles: **Senior Lecturer II- Accounting** (see below for details)

Director of Firm Relations- Accounting 1/2011-2/1/2020

Advisor- Beta Alpha Psi (see below of details)

Director- Volunteer Income Tax Assistance (see below for details)

Executive Experience:

Owner/Consultant- Accounting/Taxation 1/2006- Present

- Providing accounting and taxation consulting services to individuals in western Massachusetts on a pro-bono basis.

CFO of Good and Healthy, Inc.- Accounting 11/2012- Present

- Oversee all financial decisions of a growing 5-million-dollar multi-company restaurant group.
- Created and maintain all tax compliance information and filings with the federal and state governments
- Consult with shareholders on business growth and projections.

Director of Firm Relations- Accounting 1/11- 2/1/2020

- Created the position to help manage relationships with all of our accounting-recruiting firms.
- Within 1 year successfully increased the number of students placed in public accounting externships, internships and full-time jobs. Placement rates increased from roughly 75% to close to 90%, and we are currently consistently at full employment.
- Advise both undergraduate and graduate students on careers, obtaining their CPA credentials, interviewing, networking skills and other various business topics.
- Work directly with the Chase Career Center in communications with our recruiting firms, and on student development and job placement.
- Produce events and workshops through the Accounting Department, Chase Career Center and Beta Alpha Psi. The majority of events are in partnership with our recruiting firms and students, to help ensure our students are prepared for the professional workforce.
- Created opportunities for students to get involved in and win national case competitions with some the world largest public accounting firms, Deloitte, KPMG and PWC.

Advisor - Beta Alpha Psi- National/Worldwide Accounting Honors Fraternity 1/11-Present

- Increased membership in the first semester from 10 to over 100 students.
- Went from a Mission Based chapter to a Superior Chapter, which is the highest level of achievement.
- Nationally recognized for:

- Being the top chapter in New England for commitment to diversity and inclusion and ethical awareness.
- Winner of the Outstanding Faculty Advisor Award from RSM and BAP in 2016, in recognition of my leadership.
- Most Improved Chapter (throughout the US)- \$500 award
- First place winners of the Ernst & Young Diversity Award (throughout the US)- \$2,500 award, and 3 times second place winners since 2016
- Winner Grant Thornton Ethics Award- three times since 2011
- Superior Chapter status each year since taking over in 2011
- Annually- award for most VITA returns prepared in the US utilizing BAP members and candidates, most volunteers in the US and most volunteer hours in the US.

**Professional
Employment:**

Meyers Brothers Kalicka, P.C. - Holyoke, MA Tax Manager 6/02-2011

- Manager of the non-profit tax practice with clients including, the United Way of Pioneer Valley, Springfield Library and the Basketball Hall of Fame to name a few.
- Responsible for running all phases of tax engagements.
- Analyzed and reviewed job budgets and cost reports and communicated results to partners.
- Communicated tax and business findings to upper management through written reports and oral presentations.
- Developed and offered improvements to clients accounting operations and controls based on tax findings.
- Instructed 30-40 clients and staff in yearly sessions on new tax laws.
- Lead multiple teams of 2-4 staff at any one time.
- Wrote and delivered thoughtful performance reviews for junior staff

Arthur Andersen, LLP- Hartford, CT Sr. Tax Acct. 00-02

- Supervised and coordinated projects for some of Connecticut's largest non-profits and for profits.
- Reduced fees on the majority of non-profit clients served by 10-20% through implementation of new technologies.
- Oversaw teams of 2-6 staff with budgets between \$50,000 and \$500,000

Arthur Andersen, LLP- Boston, MA Sr. Acct. 96-99

- Senior on some of Boston's largest Initial Public Offerings, including Iron Mountain
- Coordinated and led client meetings, including those with various executive management.
- Oversaw teams of 2-8 staff with budgets between \$200,000- \$850,000+

**Teaching
Experience:**

**University of Massachusetts, Isenberg School of Management, Amherst
Full Time Senior Lecturer II – 1/06-present**

Instructor- Financial and Managerial Accounting 633 for Isenberg MSB&A program-8/2020-present

- Teaching graduate students, the principals of introductory accounting and cost accounting, with a focus on "real world" examples. A major focus of the course is case work analysis and in class group work and discussions.

Instructor- Introductory Accounting 233 for Isenberg Business Minor Program- 1/2021- Present

- Teaching undergraduate college students, the fundamental principles of financial accounting and reporting and managerial accounting cost concepts.

Instructor- Introductory Accounting- 221, both online and live to over 600 students- 1/06-12/31/2019

-Managerial Accounting- 222 -1/06- 2011, Winter 2021

- Teaching undergraduate college students, the fundamental principals of financial accounting and reporting and managerial accounting cost concepts.
- Oversaw honors sections of 221 and 222- until 2011
- Oversaw all Accounting PHD students who taught sections of 222.
- Accounting 221 consists of approximately 500+ students a semester.
- Oversee 11 student TA's who run 20 labs.
- Students learn through lecture, in class electronic response system, discussions sections, homework problems (both online and book), and tests. A major part of the course involves the completion of a series of annual report projects, where students work to develop analytical and critical thinking skills. Students also prepare an accounting video.

Co-Instructor- Semester in the Profession Program (SIPP)- 9/09-Present

- Teaching undergraduates and graduates the audit, assurance and consulting introductory information needed to work in public accounting during their busiest season, Jan-March/April.
- Coordinate all aspects of job placement with our large, midsized and small regional public accounting firms.
- Work directly with Chase Career Center on placements and job evaluations.

Instructor- Master in the Science of Accounting course 615- Ethics in Accounting – 9/07-present

- Providing students with the background and application of ethical principles that are essential to all professionals. The course is taught online through lectures, discussions, readings and case analysis and quizzes.

Instructor- Master in the Science of Accounting course 607TX-Fed Taxation of Indiv & Bus- 5/17- present

- Teaching students, the implications of current tax law and policies for individual and business decisions through video lectures, research projects, application and issue recognition problems, tax planning cases and group work. This is an online course.

Instructor- Master in the Science of accounting course 798- Advanced Federal Taxation- summers 6/06-2016

- Teaching students, the implications of current tax law and policies for business decisions through lectures, research projects, application and issue recognition problems, tax-planning cases, and in class discussion and group work.

Instructor- Individual Income Taxes- 371 Online- 6/2001-present

- Teaching undergraduate college students, the laws relating to federal taxation of income received by individual taxpayers
- Developed the online tax course for Acctg. 371
- Teaching students through lectures (both in class and online discussions), homework problems, tests and the preparation of comprehensive individual income tax returns.

Instructor-Intermediate Accounting 321 – 1/07-2010

- Teaching undergraduate students, the concepts and pronouncements related to intermediate accounting I.
- Teach students how to use research databases, compare and contrast Generally Accepted Accounting Principles and International Financial Reporting Standards, evaluate financial statements and related footnote disclosures and discuss the impact of ethics on the profession.

University of Massachusetts, Isenberg School of Management, Amherst

PMBA Program/Continuing Education Department- 1/07- 2010

Instructor- Introduction to Accounting 630 and Managerial Accounting- 631

- Teaching graduate students, the principals of introductory accounting and cost accounting, with a focus on “real world” examples. A major focus of the course is case work analysis and in class group work and discussions.

Travel Programs: University of Massachusetts, Isenberg School of Management, Amherst
Full Time Lecturer- 1/06- 1/2011

International Travel Programs:

- **Ghana Business Development and global Citizenship- Co-leader** with Dennis Hanno, President of Wheaton College. Lead student groups of up to 26+ students to Ghana and Uganda, Africa. 2001-2009. Setup a business-learning center and teach business seminars to various schools and community groups in Secondi, Ghana.
- **Leader-Business Development and Conflict Resolution in Ireland.** Spring semester long course, which culminates with a 2-week trip to the Republic of Ireland and Northern Ireland.

Volunteer Programs:

Volunteer Income Tax Assistance Program (VITA), University of Massachusetts, Amherst
Director- 1/05-present

- Oversee over 100 students from across campus in volunteer positions, to prepare over 1700 income tax returns a season for both domestic and international student taxpayers. VITA runs and is overseen as a part of the IRS taxpayer assistance program. The program focuses on helping disabled and low-income taxpayers. Helped to refund over \$1.3 million in 2018.
- Award for most VITA returns prepared in the US using BAP members and candidates, most volunteers in the US and most volunteer hours in the US.

Memberships: Professional memberships

- Member, American Institute of Certified Public Accountants
- Member, Massachusetts Society of Certified Public Accountants

Board Work: Board of Directors work

- Chair, Cooley Dickenson Health Care Childbirth Center Campaign
- Director, Northampton Dollars for Scholars (past president)
- Director, Nyansa Project
- Treasurer, Idea 4 Africa

Awards: Awards received

- Beta Alpha Psi Outstanding Faculty Advisor Award- 2016
- MSCPA Outstanding Educator Award- 2014
- Isenberg School Excellence in Teaching award, Spring 2011
- Business West 40 under 40- 2007
- Young Alum of the year, UMass- Isenberg School of Management – 2004
- Excellence in Teaching Award, UMass, Amherst 2000
- Nominated 7 times (including this year) for the University wide Distinguished Teaching Award
- Nominated 3 times for the University wide Manning Prize

Committee

Work:

Cross Campus and Isenberg Committees

- Chair, Isenberg and EY Inclusive Leadership Summit October 18-19, 2019. Personally, raised over \$80,000 to host the Summit, one of the first of its kind in New England. This Summit connected students and thought leaders in diversity and inclusion.
- Senior Commencement Speaker committee member, along with one student selected from Isenberg.
- Department of Higher Education- Mass Transfers Pathways, member, Isenberg Lead-2016-Current
- Member, Isenberg Career and Professional Development Task Force. The Dean of Isenberg selected members. This yearlong (2011/12) project culminated with recommendations to help the school move into the top 20 category for career and professional development nationwide.
- UMass Personal Response System. One of eight members selected by the Provosts office to evaluate and select a system the entire campus can use. This system is still in use today (iClicker).
- Massachusetts Society of Certified Public Accountants Educational Foundation, member, 2018-current
- Hiring Committee, Isenberg Accounting Department. Selected to serve on two hiring committees within the department.
- Scholarship Committee, Accounting Department. For the past six years, I have served on the committee to help award-deserving students with scholarships.
- OWL Online Campus Testing Committee- member

**Continuing
Education:**

In addition to the above, every two years I spend at least 80 hours on continuing professional development. These hours are comprised of classes, conferences, instructor lead classes and web classes in the areas of taxation, auditing and accounting, and ethics.