BRIAN G. SHEA, ESQ.

1500 General Knox Road, Russell, Massachusetts 01071

Phone: (413) 530-6658 • **Email:**bshea@isenberg.umass.edu

Professional Summary

Seasoned law lecturer and accomplished legal practitioner with 25 plus years bridging law and business development. Full-time Lecturer at University of Massachusetts, Isenberg School of Management since 2022. Delivering high impact courses including Business Law, Law for CPAs, Harnessing Artificial Intelligence. Striving to foster critical thinking, ethical reasoning, and career ready skills. Committed to advancing the Isenberg School of Management's mission of providing an exceptional education and developing leaders of high integrity, and to fulfilling its vision through excellence in management education, applied knowledge, and impactful engagement with students and external partners. I advance this mission by designing learner focused experiences in an impactful learning environment that prepares students for changing environments, supporting outreach and engagement through mindful of innovative pedagogy and professional growth.

AREAS OF EXPERTISE:

Business Management – Municipal Law - Agency Law – Land Use – Zoning - Courts and the Judiciary Civil Procedure - Criminal Procedure – Litigation - Ethics - Federal, State and Local Taxation – Constitutional Law - Contract Law - Commercial Law- Organizational Governance Trusts and Estates - Bankruptcy – Landlord Tenant Law - Property Law – Access to Justice

EDUCATION

Juris Doctorate (J.D.) – Roger Williams University School of Law 1996

Bachelor of Science - Business Management Concentration: Accounting 1990
Westfield State College n/k/a Westfield State University

ACADEMIC EXPERIENCE

University of Massachusetts – Amherst, Massachusetts 2017 to Present
(Part-time Lecturer 2017-2023; Full-time 2023 – Present)

A full-time law lecturer at Isenberg School of Management. Delivering engaging instruction on a range of business focused law courses, emphasizing practical application, critical thinking and ethical decision making. Courses incorporate relevant and current legal topics tailored for student development and professional success. I foster practical engagement, critical thinking, and ethical awareness in the classroom, while staying current with legal developments to provide students with applicable and actionable knowledge for their future careers.

Key courses taught:

Intro to Business Law: Comprehensive examination of foundational and advanced topics which include commercial law, contracts, agency, corporate governance and responsibility.

Law for CPAs: Explores legal principles, regulatory and compliance frameworks essential to future accounting professionals, with a focus on the legal and compliance topics covered in the Taxation and Regulation (REG) section of the Uniform Certified Public Accountant Examination.

Ethics and Law in Artificial Intelligence (k/n/a Harnessing Artificial Intelligence) : Exploring legal and ethical challenges posed by emerging technologies, with a focus on AI regulations, data privacy, intellectual property, and responsible innovation.

Western New England University - Springfield, Massachusetts 1999 to 2006
f/n/a Western New England College

Instructor – Business Law I and II – Course(s) provided in depth analysis on a wide range of legal topics to management, business and accounting degree candidates. Areas of study included the court system (federal and state), Alternative Dispute Resolution, application of constitutional law to business, agency law, contract law, Uniform Commercial Code Articles 2 and 9, criminal law, criminal procedure, discrimination, affirmative action and human resource management.

Instructor – CPA Law – Course provided graduate students an opportunity to review all topics typically tested by the Uniform Certified Public Accountant Examination. The course was limited to one semester and required a fast paced, intense but thorough analysis of topics common to the law section of the CPA exam.

Instructor – Employment and Business Organizations - Course designed as a workshop for graduate students reviewing the various considerations when forming a business entity. The course included an in-depth study of the factors (taxation, functionality and limitations upon liability) considered when forming an entity. Course included an expansive exploration of various types of entities available. Course also included a review of employment law topics including discrimination practices and affirmative action.

Holyoke Community College - Holyoke, Massachusetts 1998 to 2000

Instructor – Business Law I and II – Course(s) provided in depth analysis on a wide range of legal topics to management, business and accounting degree candidates. Topics included study of the court system (federal and state), Alternative Dispute Resolution, application of constitutional law to business, Agency Law, Contracts, Uniform Commercial Code Articles 2 and 9, Contract Law, Criminal Law and Criminal Procedure.

Elms College - Chicopee, Massachusetts 1991

VISITING LECTURER – INTERMEDIATE ACCOUNTING II – Essential core requirement for all accounting students. Course included accounting methods and procedures under Generally Accepted Accounting Principles (GAAP) and International Financial Reporting Standards (IFRS). Topics included investments, current liabilities and contingencies, bonds and long-term notes, leases, accounting for income taxes, pensions, shareholders' equity, earnings per share, share-based compensation, accounting errors, and the statement of cash flows.

PROFESSIONAL EXPERIENCE

Koverage Insurance Group, LLC – Enfield, Connecticut 2019 to 2023

In-house General Counsel and Chief Financial Officer for a portfolio of insurance agencies throughout Connecticut. Operations focused primarily on the eastern portion of the United States and involve placing property & casualty coverage for consumers and commercial insureds. Business Model formulated on the theory of achieving rapid growth through acquisition of similar agencies that maintain stable operations and that have achieved branded recognition within their community.

Acquisition – Directed all legal aspects of mergers and acquisitions, successfully integrating multiple insurance agencies from various states into the Connecticut based network. Expertise spanned diverse deal structures, including asset purchases and stock purchases, aligning with the growth model of acquiring stable, community-branded operations.

Financial – Directed the implementation of a structured accounting system that replaced informal bookkeeping practices, significantly improving budgeting capabilities, financial reporting processes, and overall compliance for the network of insurance agencies.

Human Resources – Established a regimented HR framework for all work locations, spanning pre-pandemic operations through the challenges of the COVID-19 period. Pioneered a systematic workforce management strategy to standardize recruiting, onboarding, performance evaluation, and compliance.

Executive Team – Functioned as an active participant on the executive team, working closely with fellow leaders to shape and execute strategic direction, including acquisition strategy, financial planning, HR framework development, and adaptation to evolving market conditions.

Law Offices of Brian Shea, P.C. – Agawam, Massachusetts 2004 to Present

Principal Member of well-established local law firm serving a diverse client base over a significant geographic area. Manage daily operations and business functions, while continuing to effectively balance caseload. Serviced large high-profile clients by providing focused attention to more effective legal counsel. Cultivated a small legal practice into a large, expanded business throughout Massachusetts and Connecticut during period of economic recession. Areas of expertise:

- *Taxation* – Prepare fiduciary, partnership, corporation, estate and individual tax returns. Offer tax and succession planning individuals. Engaged with corporations and other business as well as international clients. Versed in municipal taxation including abatements and appeals for erroneous tax assessments.
- *Estate Planning* – Prepare complete estate plans for all clientele from small simple estate plan to complex multi-generational models geared towards preservation of wealth and minimize inheritance tax.
- *Landlord Tenant Law* – Represent clients in all matters related to landlord/tenant relationship including eviction actions. Prepare governing documents such as leases, management agreements, operational rules & regulations and similar documents. Achieved heightened knowledge base for all federal and state-subsidized housing programs, including section 8 project based, choice voucher programs, affordable housing programs and tax credit subsidies.
- *Commercial Law* – Guide new and established business organizations on formation, reorganization, and dissolution of various business entities. Advise clients' outside tax advisors on tax impact offered during planning phase. Formed and negotiate contracts, including lease and employment contracts and other documents associated with debt financing including secured transactions.
- *Real Estate* – Service clients ranging from first-time homebuyers to the largest of mortgage services. Regularly engage in purchases, sales, refinances, private lender transactions, commercial and residential transactions. Representations included serving as lender's counsel.
- *Litigation* – Selectively engage in matters of genuine interest to the firm and its associations. While the firm did not actively seek clients that would require the need to engage in litigation the operation of the firm required the ability to provide those services.

- *Pro Bono* – Routinely provide legal services without compensation or any expectation of compensation to persons of limited resources, to charitable, religious, civic, community, governmental, and educational organizations in matters that are designed primarily to provide services that such clients would otherwise not be able to obtain.
- *Special Council* – Engaged by the Town of Adams, Board of Health as Special Council to prosecute various matters associated with the enforcement of the sanitary code, building code and condemnation orders.
- *Municipal and Quasi Municipal Engagements* – Represented Housing Authorities on various engagements including negotiating leases, easements and compensation for takings or on eviction matters.

Mulberry Law Group – Springfield, Massachusetts 1997 to 2004

ATTORNEY AT LAW/MANAGING PARTNER

- Joined and established legal practice upon obtaining license within Massachusetts.
- Introduced proven business practices to manage all business functions and became Managing Business Partner.
- Simplified billing, accounting. Introduced management program for employees.
- Developed skill set necessary to practice law within an association of independent attorneys.
- Cultivated client relationships to sustain a growing legal practice.
- Maintained unique blend of business manager and business development for practice.
- Successfully maintained top revenue producer for final three consecutive years of association.
- Gravitated from small simple engagements within specialized practice areas to becoming a recognized authority within legal community and among the judiciary.

LGB Traffic Consultants, Inc. – Leominster, Massachusetts 1995 to 1996

CORPORATE CONTROLLER

Recruited by Owner/CEO to implement and manage all financial reporting functions for this 35-person logistics solutions company. Facilitated interdepartmental communication and provided managerial oversight to department heads and staff, with four direct reports.

- Integrated fiscal responsibility and financial analysis of cost and opportunity company-wide.
- Prepared and presented reports and data to executive team; analyzed monthly results, capital investments, customer and product profitability, new product introductions, cost centers, budgets and forecasts, contracts and agreements, and business decision.
- Prepared forecasts and administered budgets and maintained financial records and systems.
- Ensured compliance with corporate governance, policies and procedures as well as government income, sales/use and property tax requirements.

ADDITIONAL EXPERIENCE

Massachusetts Continuing Legal Education (MCLE) – Massachusetts 1997 to 2007

FACULTY – PROVEN COLLECTION STRATEGIES – Workshop offered to lawyers to develop skills in prosecuting contract claims on a small or large scale. Workshop focused on developing models to introduce into a practice to bring a contract claim from making demand to collection.

LICENSES

License to Practice Law in Massachusetts
License to Practice Law in Connecticut
License to Practice in the Federal Courts of Massachusetts
License to Practice in United States Tax Court

AFFILIATIONS

Contributor/Consultant/Visiting Lecturer, Massachusetts Small Business Development Center Network

AWARDS & ACHIEVMENTS

Recipient of Certificate of Achievement, Massachusetts Society of CPAs for having successfully completed and passed all four areas of the Uniform Certificate Public Accountants Examination on the first sitting.

Interest

Avid Sailor, Patient Golfer, Frustrated Musician and Focused Pilot

References

Attorney Frank Caruso
30 Camp Jahn Road
Southampton, MA 01073
Phone (413) 732-3320
Email: Caruso@AOL.com

Rodney Pease
60 Woodside Road
Ludlow, MA 01056
Phone: (413) 478-6784
Email: rodney.pease@gmail.com

Hon. Michael Mulcahy
Palmer District Court
285 Sykes Street
Palmer, MA 01069
Phone: (413) 283-
8916