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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- Accounting** (see below for details)

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

Director of Firm Relations- Accounting 1/11- Present

- Manage relationships with our top recruiting firms. Successfully helped to increase the number of students placed in public accounting externships, internships and full time jobs.
- Advise students on career, obtaining their CPA credentials, interviewing, networking skills and other various business topics. Work directly with the Chase Career Center to help with student development and job placement.
- Produce events and workshops for students to help prepare them for the professional workforce.

Advisor to 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:
 - Most Improved Chapter (throughout the US)- \$500 award
 - First and second place winners of the Ernst & Young Diversity Award (throughout the US)- \$2,500 award
 - Winner Grant Thornton Ethics Award- two times
 - Superior Chapter status each year since taking over in 2011
 - Annually- 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.

**Teaching
Experience:**

University of Massachusetts, Isenberg School of Management, Amherst
Full Time Senior Lecturer

**Instructor- Introductory Accounting- 221, both online and
live to over 600 students- 1/06- Present
Managerial Accounting- 222 -1/06- 2011**

- 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 a total of 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.

University of Massachusetts, Isenberg School of Management, Amherst
Full Time Lecturer- Accounting Department- 9/07- Present

**Instructor- Master in the Science of Accounting course 615-
Ethics in Accounting - (fall and spring)**

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

University of Massachusetts, Isenberg School of Management, Amherst
Full Time Lecturer- Accounting Department- 5/17- Summers

**Instructor- Master in the Science of Accounting course
697TX-ST-Principals/Fed Tax/Indiv & Bus**

- 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.

University of Massachusetts, Isenberg School of Management, Amherst
Full Time Lecturer- Accounting Department- 6/06- 2016

**Instructor- Master in the Science of accounting course 798-
Advanced Federal Taxation-(summers)**

- 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.

Teaching

Experience (cont.): **University of Massachusetts**, Isenberg School of Management, Amherst
Continuing Education Department- 7/00- Present

Instructor- Individual Income Taxes- 371 Online

- 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.

University of Massachusetts, Isenberg School of Management, Amherst
PMBA Program/Continuing Education Department- 01/07- 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.

University of Massachusetts, Isenberg School of Management, Amherst
Full Time Lecturer- Accounting Department- 01/07-2010

Instructor- Intermediate Accounting 321

- 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.

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 of Babson 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:

University of Massachusetts, Isenberg School of Management, Amherst
Full Time Lecturer/Director- 1/05- Present

Volunteer Income Tax Assistance Program (VITA):

- Oversee up to 90 students in volunteer positions, to prepare over 1700 income tax returns a season for both domestic and international 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 2013.
- 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.

Professional Employment:

Meyers Brothers Kalicka, P.C. - Holyoke, MA **Tax Manager 6/02-2011**
Arthur Andersen, LLP- Hartford, CT **Sr. Tax Acct. 00-02**
Arthur Andersen, LLP- Boston, MA **Sr. Acct. 96-99**

Memberships:

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

Board Work:

Director, Northampton Dollars for Scholars
Director, Nyansa Project

Awards:

Excellence in Teaching Award, Umass, Amherst 2000
Young Alum of the year, Umass- Isenberg School of Management – 2004
Business West 40 under 40- 2007
Isenberg School Excellence in Teaching award, Spring 2011
MSCPA Outstanding Educator Award- 2014
Beta Alpha Psi Outstanding Faculty Advisor Award- 2016

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.