

SUSAN B. ANDERS, Ph.D., CPA, CGMA

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| Midwestern State University | Office: (940) 397-4361 | 5505 Long Leaf Drive |
| Dillard College of Business Adm. | Fax: (940) 397-4693 | Wichita Falls, TX 76310 |
| Wichita Falls, TX 76308 | Cell: (716) 378-7765 | (940) 696-9335 |

| | | |
|------------------|--------------------------------------|---------------|
| EDUCATION | TEXAS TECH UNIVERSITY | Lubbock, TX |
| | Ph.D. in Business Administration | December 1998 |
| | Major: Tax Accounting | |
| | Minors: Statistics and Economics | |
| | TEXAS TECH UNIVERSITY | Lubbock, TX |
| | M.S. in Business Statistics | May 1997 |
| | Minor: Tax Accounting | |
| | UNIVERSITY OF NORTH TEXAS | Denton, TX |
| | M.S. in Tax Accounting | December 1986 |
| | SOUTHERN METHODIST UNIVERSITY | Dallas, TX |
| | B.B.A. in Accounting | May 1978 |

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|----------------------|---|------------|
| CERTIFICATION | Certified Public Accountant, Texas and New York (1980) | |
| | Chartered Global Management Accountant (2014) | |
| | Certified Volunteer Income Tax Assistance (VITA) Volunteer | Current |
| | Registered and Certified AICPA/NYSSCPA Financial Literacy Volunteer | Since 2005 |

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|---------------------|---|
| DISSERTATION | Does the Earned Income Tax Credit Encourage or Discourage Work Effort: An Empirical Study |
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|---------------------------|----------------------|-----------------|--------------------------|------------|
| RESEARCH INTERESTS | Tax Policy | Tax Law | Tax Practice | Technology |
| | Accounting Education | Social Security | International Accounting | |

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|---------------------------|---------------------|
| TEACHING INTERESTS | Taxation—all topics |
| | Accounting Ethics |

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|----------------------------|---|-------------------|
| TEACHING EXPERIENCE | MIDWESTERN STATE UNIVERSITY | Wichita Falls, TX |
| | Louis J. and Ramona Rodriguez Distinguished Professor of Accounting | 2015 to Present |
| | Interim Chair of Accounting and MIS Departments | 2016 to 2017 |
| | Rank of Professor, Tenured | 2019 to Present |

Courses taught:

- Federal Income Tax I (Undergraduate)
- Federal Income Tax II (Undergraduate)
- Financial Accounting (Undergraduate)
- Business Ethics (Undergraduate, approved by TSBPA)
- Federal Tax Research (Graduate)
- Volunteer Income Tax Assistance Training

**TEACHING
EXPERIENCE**
(continued)

ST. BONAVENTURE UNIVERSITY St. Bonaventure, NY
Professor of Accounting 2007 to 2015
Chair of Accounting Department 2011 to 2014
Associate Professor of Accounting 2003 to 2007
Assistant Professor of Accounting 1998 to 2003

Undergraduate:

Introduction to Taxes
Advanced Taxes
Volunteer Income Tax Assistance Training
International Accounting
Introduction to Financial Accounting

Graduate:

Federal Taxation
Federal Tax Policy
International Accounting
Accounting Foundations

TEXAS TECH UNIVERSITY

Teaching Assistant Lubbock, TX
1994 to 1998
Individual Income Taxation
Advanced Income Taxation
Principles of Accounting

DELOITTE & TOUCHE

Manager—Tax Services Dallas, TX
1987 to 1993
Staff orientation, training and resource materials
Training seminars on tax return preparation
Tax update training courses

**PROFESSIONAL
EXPERIENCE**

VOLUNTEER INCOME TAX ASSISTANCE (VITA)

Quality Reviewer and Trainer Wichita Falls, TX
Recruit, train, and supervise student volunteers 2015 to Present

Site Coordinator, Quality Reviewer, and Trainer Olean, NY
Responsible for all site operations and quality control 2003 to 2015
Recruit, train, and supervise volunteers
Mentor other site coordinators and share training materials

TEXAS TECH UNIVERSITY

Research Assistant Lubbock, TX
Dr. Jane O. Burns (retired 1997, passed 2023) 1994 to 1996
Data collection and analysis
Journal reviewer
Course materials and continuing education materials
Substitute instruction/grading assistance

Dr. Mary Sue Gately (retired 1998) 1993 to 1994
Continuing education materials
Technical cases for graduate course
Substitute instruction/grading assistance

**PROFESSIONAL
EXPERIENCE**

(continued)

DELOITTE & TOUCHE

Manager-Tax Services

Dallas, TX
1987 to 1993

- Tax planning, consulting, and compliance:
 - Construction, real estate, service industries, and nonprofit organizations
 - Public corporations, syndicated partnerships, consolidated returns
 - Closely-held businesses, individuals, partnerships, and S corporations
- Represented clients before taxing authorities

DOHM & WOLFF

Senior Tax Accountant

Dallas, TX
1984 to 1987

SHARP, BAUSCH & CO.

Senior Accountant

Dallas, TX
1980 to 1983

PHILIP VOGEL & CO.

Staff Accountant

Dallas, TX
1978 to 1980

**REFEREED
PUBLICATIONS**

Articles in *The CPA Journal* are available at: <http://www.cpajournal.com>

“Teaching Tax Ethics: Resources for Educators,” *The Tax Advisor*, February (2024), with Thomas J. Purcell, pp. 46-49.

<https://www.thetaxadviser.com/issues/2024/feb/teaching-tax-ethics-resources-for-educators.html>

Table of Comparison of AICPA and IRS/Treasury Standards

<https://www.thetaxadviser.com/content/dam/tta/issues/2024/feb/comparison-aicpa-irc-treasury-ethics-standards.png>

“Practice Management and Tax Practice in the Current Environment: 2022 Annual Survey of New York State Practitioners,” *The CPA Journal*, November/December (2022), with Carol M. Fischer, pp. 28-41.

<https://www.cpajournal.com/2023/01/23/practice-management-and-tax-practice-in-the-current-environment/>

“Tax Software in the Ongoing Pandemic Environment: 20th Anniversary / 2021 Annual Survey of New York State Practitioners,” *The CPA Journal*, October/November (2021), with Carol M. Fischer, pp. 20-33.

<https://www.cpajournal.com/2022/02/22/icymi-tax-software-in-the-ongoing-pandemic-environment/>

“Tax Software in the COVID-19 Environment: 2020 Annual Survey of New York State Practitioners,” *The CPA Journal*, December/January (2020/21), with Carol M. Fischer, pp. 30-43.

<https://www.cpajournal.com/2021/02/08/tax-software-in-the-covid-19-environment/>

Top Story in *Accountants' Daily Insights* on February 17, 2021 and again on May 11, 2021.

“The Best Tax Software: 2019 Annual Survey of New York State Practitioners,” *The CPA Journal*, November (2019), with Carol M. Fischer, pp. 16-29.

<https://www.cpajournal.com/2019/11/26/the-best-tax-software-2019/>

Top Story in *Accountants' Daily News* on November 26, 2019. Rose to first most read article on November 27, 2019.

“Finding the Right Tax Software: 2018 Annual Survey of New York State Practitioners,” *The CPA Journal*, November (2018), with Carol M. Fischer, pp. 20-33.

<https://www.cpajournal.com/2018/12/12/icymi-finding-the-right-tax-software/>

Top Story in *Accountants' Daily News* on November 15, 2018. Rose to second most read article on November 21, 2018.

“Overcoming Obstacles with the Right Tax Software: 2017 Annual Survey of New York State Practitioners,” *The CPA Journal*, November (2017), with Carol M. Fischer, pp. 18-31.

<https://www.cpajournal.com/2017/11/16/overcoming-obstacles-right-tax-software/>

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“Top Choices in Tax Software: 2016 Annual Survey of New York State Practitioners,” *The CPA Journal*, November (2016), with Carol M. Fischer, pp. 19-33.

<http://www.cpajournal.com/2016/11/23/top-choices-tax-software/>

“Top Choices in Tax Software: 2015 Annual Survey of New York State Practitioners,” *The CPA Journal*, November (2015), with Carol M. Fischer, pp. 22-35. **Recognized as “Editor’s Choice”**

<https://www.nysscpa.org/news/publications/the-cpa-journal/issue?IssueID=225>

“The Best Bets in Tax Software: 2014 Annual Survey of New York State Practitioners,” *The CPA Journal*, November (2014), with Carol M. Fischer, pp. 14-25.

Cited as the Top Story in *AccountantsWorld Daily News* on December 2, 2014:

<http://www.accountantsworld.com/newsletter/dailynews/readnewsletter?dhnDate=12/2/2014>

“A New Look at Tax Software: 2013 Annual Survey of New York State Practitioners,” *The CPA Journal*, December (2013), with Carol M. Fischer, pp. 20-29.

“A Clear Look at Tax Software: 2012 Annual Survey of New York State Practitioners,” *The CPA Journal*, November (2012), with Carol M. Fischer, pp. 16-25.

“A Clear Look at Tax Software: 2011 Annual Survey of New York State Practitioners,” *The CPA Journal*, November (2011), with Carol M. Fischer, pp. 16-24.

“The Reach of Service Learning: A Profile of VITA Volunteers and Clients,” *Business Education Digest Foundation*, Issue XVIII (2011), with Carol M. Fischer, Laura L. Brown, and Matthew P. Vilasi, pp. 1-11.

“A Clear Look at Tax Software: 2010 Annual Survey of New York State Practitioners,” *The CPA Journal*, May (2010), with Carol M. Fischer, pp. 14-21.

“Encouraging Undergraduate-Faculty Collaborative Research,” *Journal of Business and Leadership*, Vol. 5 No. 2 (2009), with Steven C. Hall, Barbara W. Scofield, and Robert J. Walsh, pp. 26-32.

<http://scholars.fhsu.edu/jbl/vol5/iss2/5/>

“A Clear Look at Tax Software: 2009 Annual Survey of New York State Practitioners,” *The CPA Journal*, May (2009), with Carol M. Fischer, pp. 20-29.

**REFEREED
PUBLICATIONS
(continued)**

“A Clear Look at Tax Software: 2008 Annual Survey of New York State Practitioners,” *The CPA Journal*, May (2008), with Carol M. Fischer, pp. 20-28.

“Cash to Cash Analysis and Measurement: Useful Performance Measures for Improving Profitability,” *The CPA Journal*, August (2007) with Paul D. Hutchison and M. Theodore Farris, pp. 42-47.

“Promoting Perceptions of Fairness: A Proposed Tax Incentive for Payers of Child Support,” *The CPA Journal*, June (2007) with Paul D. Hutchison and Gary M. Fleischman, pp. 40-43.

“A Clear Look at Tax Software: 2007 Annual Survey of New York State Practitioners,” *The CPA Journal*, May (2007), with Carol M. Fischer, pp (16-24.

“A Hard Look at Tax Software: 2006 Annual Survey of New York State Practitioners,” *The CPA Journal*, July (2006), with Carol M. Fischer, pp. 18-25.

“Social Security: The Past, the Present, and Options for Reform,” *The CPA Journal*, May (2006) with David S. Hulse, pp. 20-31.

Received 2006 Max Block Distinguished Article Award from NYSSCPA
<http://www.cpajournal.com/2007/607/perspectives/p6.htm>

“Surveying Professional Accountants: Strategies for Success,” *Journal of Accounting and Finance Research*, Vol. 13, No. 5 (2005), with Carol M. Fischer, pp. 189-196. [published in 2007]

“Financial Literacy: CPAs Can Make a Difference,” *The CPA Journal*, September (2005), with Timothy M. Crawford, pp. 6-9.

“A Hard Look at Tax Software: 2005 Annual Survey of New York State Practitioners,” *The CPA Journal*, July (2005), with Carol M. Fischer, pp. 21-27.

“Do Professor Gender and Teaching Style Matter to Business Students?” *Journal of Business Disciplines*, Vol. V, No. 2 (2004), with Kathleen M. Premo, pp. 43-58.

“A Hard Look at Tax Software: 2004 Annual Survey of New York State Practitioners,” *The CPA Journal*, July (2004), with Carol M. Fischer, pp. 18-28.

“A Hard Look at Tax Software: 2003 Annual Survey of New York State Practitioners,” *The CPA Journal*, November (2003), with Carol M. Fischer, pp. 26-33.

**REFEREED
PUBLICATIONS**
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“An Experiential Learning Exercise: Student Participation in a Survey on Social Security,” *Journal of Accounting and Finance Research*, Vol. 10, No. 6 (2002), pp. 99-110.

“A Hard Look at Tax Software: A Survey of New York State Practitioners,” *The CPA Journal*, November (2002), with Carol M. Fischer, pp. 20-26.

“An Empirical Analysis of the Effect of the Earned Income Tax Credit on Work Effort,” *Advances in Taxation*, Vol. 14 (2002), pp. 1-36.

“Social Security: An Opinion Survey of the Issues and Alternatives,” *Journal of Accounting and Finance Research*, Vol. 9, No. 4 (2001), pp. 99-110.

**OTHER
PUBLICATIONS**

Monthly **Tech Talk** (formerly “Website of the Month”) Column for *The CPA Journal*, since January 2002.
[CPAJ articles are available online at www.cpajournal.com.]

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| Jul/Aug 2024 | Generative AI Resources | |
| May/June 2024 | Free Estate Tax Resources | p. 76 |
| Mar/Apr 2024 | Nonprofit Accounting Resources: BDO and CBIZ MHM | p. 76 |

Highlighted by FeedSpot publications, linked to

https://www.cpajournal.com/2024/07/15/nonprofit-accounting-resources-bdo-and-cbiz-mhm/#google_vignette

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| Jan/Feb 2024 | Professional Independence Resources | p. 76 |
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Cited/Promoted on LinkedIn by Unison Globus

https://www.linkedin.com/feed/update/urn%3Ali%3Aactivity%3A7164260646325284864/?midToken=AQECiFcXkrnLug&midSig=3xs5uocV_ToX81&trk=eml-email_notification_single_mentioned_you_in_this_01-notifications-1-hero%7Ecard%7Efeed&trkEmail=eml-email_notification_single_mentioned_you_in_this_01-notifications-1-hero%7Ecard%7Efeed-null-4e6vnd%7Elsq3wr%7Efr-null-voyagerOffline

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| Nov/Dec 2023 | Accounting Practice Apps | p. 72 |
| Sep/Oct 2023 | CPA Evolution Resources | p. 76 |
| Jul/Aug 2023 | Sustainability Accounting Resources | p. 76 |
| May/June 2023 | Chat GPT Resources for CPAs | p. 76 |

Highlighted on the NYSSCPA Headlines Newsletter

<https://www.nysscpa.org/news/publications#sthash.fSGU78TP.qPaSykKF.dpbs>

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| Mar/Apr 2023 | GASB Updates and Resources | p. 76 |
| Jan/Feb 2023 | The State of the Internal Revenue Service | p. 76 |
| Nov/Dec 2022 | Cybersecurity Resources for Accounting Practices | p. 76 |
| Sep/Oct 2022 | State Society Diversity, Equity, and Inclusion Resources | p. 76 |

Cited/Promoted on LinkedIn by Nick Dentice

https://www.linkedin.com/posts/nick-dentice-3012722_state-society-diversity-equity-and-inclusion-activity-7007443693326536704-CZhK?utm_source=share&utm_medium=member_android

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[CPAJ articles are available online at www.cpajournal.com.]

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| Jul/Aug 2022 | B Corporation Resources | p. 76 |
| May/Jun 2022 | Taxation of Cryptocurrency Resources | p. 74 |
| | https://www.cpajournal.com/2022/08/09/taxation-of-cryptocurrency-resources/ <i>Cited/Promoted as resource for CPAacademy.org CPE course</i> https://cpeonline.cpaacademy.org/offer/a1m2S000002IKweQAE | |
| Mar/Apr 2022 | New International Accounting Ethics Standards | p. 76 |
| Jan/Feb 2022 | Center for Audit Quality and Critical Audit Matters | p. 76 |
| December 2021 | Accounting Diversity, Equity, and Inclusion Resources | p. 62 |
| | <i>Cited/Promoted on LinkedIn by Nick Dentice</i> https://www.linkedin.com/feed/update/urn:li:activity:6900906844009959424/ | |
| Oct/Nov 2021 | COVID-Related Tax Resources | p. 76 |
| Aug/Sep 2021 | CPA Evolution Resources | p. 76 |
| Jun/Jul 2021 | Cryptocurrency Accounting Resources | p. 76 |
| Apr/May 2021 | Not-for-Profit Resources | p. 76 |
| Feb/Mar 2021 | Tax Update Resources | p. 76 |
| Dec/Jan 2021 | IRS Tax Identity Theft and Fraud Resources | p. 74 |
| Oct/Nov 2020 | CPA Firm Websites | p. 88 |
| September 2020 | Resources for Remote Learning | p. 72 |
| | https://www.cpajournal.com/2020/10/20/resources-for-remote-learning/ | |
| Jul/Aug 2020 | Cybersecurity Resources for a Remote Workforce | p. 72 |
| June 2020 | More Coronavirus Relief Resources | p. 64 |
| May 2020 | Coronavirus Relief Resources | p. 62 |
| April 2020 | Nonprofit Accounting Resources | p. 64 |
| March 2020 | ACFE and ABFA Fraud Resources | p. 62 |
| February 2020 | System Organization Control Resources | p. 68 |
| January 2020 | Free Tools from Parker Tax Pro and Bloomberg Tax | p. 64 |

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| December 2019 | Practice Management Blogs | p. 88 |
| November 2019 | Identity Theft and Taxpayer First Act Resources | p. 72 |
| October 2019 | IRS Tax Reform Resources | p. 72 |
| September 2019 | Accounting Career and Education Resources | p. 72 |
| August 2019 | Cybersecurity Tools for CPAs Headline Story in <i>Accountants’ Daily News</i> on September 25, 2019 | p. 70 |
| July 2019 | Sustainability Reporting | p. 72 |
| June 2019 | Cybersecurity Tools for CPAs | p. 72 |
| May 2019 | Family Office Resources | p. 74 |
| April 2019 | Nonprofit Resources | p. 72 |
| March 2019 | COSO’s Newest ERM Guidance | p. 66 |
| February 2019 | Audit Resources | p. 70 |
| January 2019 | Tax Cuts and Jobs Act Tools | p. 68 |
| December 2018 | Practice Management Tools | p. 70 |
| November 2018 | More Free Tax Research Options | p. 72 |
| October 2018 | State and Local Tax Resources | p. 72 |
| September 2018 | Accounting Classroom Resources | p. 72 |
| August 2018 | CFA Institute, FASB, and AICPA Roundup | p. 72 |
| July 2018 | Sustainability-reports.com | p. 72 |
| June 2018 | Best Search Engines for Accountants | p. 72 |
| May 2018 | Estate Tax Resources | p. 70 |
| April 2018 | Governmental Accounting Resources | p. 72 |
| | <i>Featured in Truth in Accounting, News (May 17, 2018)</i> https://www.truthinaccounting.org/news/detail/governmental-accounting-resources | |
| March 2018 | Ethics Resources: IFAC and IESBA | p. 72 |
| February 2018 | Lease Accounting Standards Resources | p. 74 |
| January 2018 | Tax Office Workflow Resources | p. 74 |
| December 2017 | Employer Internship and Recruitment Resources | p. 72 |
| November 2017 | Practical Data Security Resources | p. 72 |
| October 2017 | Tax Resources for Natural Disasters | p. 72 |
| September 2017 | Diversity Pipeline Resources | p. 72 |
| August 2017 | A Non-GAAP Reporting Sampler | p. 72 |
| July 2017 | Sustainability Reporting | p. 72 |
| June 2017 | Audit Data Analytics Resources | p. 72 |
| May 2017 | Elder Financial Planning Resources | p. 74 |
| April 2017 | VolunteerMatch and the BBB’s Wise Giving Alliance | p. 74 |
| March 2017 | Insureon and Landy Insurance | p. 74 |
| February 2017 | Financial Reporting Blogs | p. 74 |
| January 2017 | Tax Policy Center and Tax Podcasts | p. 74 |

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| November 2016 | Recommended Resources for Tax Practitioners | p. 72 |
| October 2016 | Free State Tax Update Resources | p. 72 |
| September 2016 | Financial Planning Resources for Women (and Men) | p. 72 |
| August 2016 | Free CPA Exam Resources | p. 64 |
| July 2016 | Financial Reporting and Securities Regulation Resources | p. 80 |
| June 2016 | World Business Council for Sustainable Development | p. 80 |
| May 2016 | National Institute of Standards and Technology | p. 72 |
| April 2016 | Association of Government Accountants | p. 72 |
| March 2016 | OCEG and The Network | p. 64 |
| February 2016 | Audit Analytics | p. 64 |
| January 2016 | Free Tax Research Resources | p. 72 |
| December 2015 | CPA Firm Management Association and U.S. Small Business Administration Learning Center | p. 72 |
| November 2015 | Roundup of Tax-Related Identity Theft Resources | p. 64 |
| October 2015 | The Taxpayer Advocate Service and U.S. Tax Brackets | p. 64 |
| September 2015 | Mint, Future Advisor, Personal Capital, and Acorns | p. 64 |
| August 2015 | American Woman’s Society of CPAs and Accounting & Financial Women’s Alliance | p. 80 |
| July 2015 | Financial Reporting Council | p. 72 |
| June 2015 | Charity Navigator and GuideStar | p. 72 |
| May 2015 | IRS2Go, Bloomberg BNA Quick Tax Reference, TaxTouch, and Monaeo | p. 72 |
| April 2015 | Accountability and International Integrated Reporting Council | p. 72 |
| March 2015 | NASBA Center for the Public Trust | p. 64 |
| February 2015 | Securities Docket and SEC Actions | p. 72 |
| January 2015 | Affordable Care Act Websites—Part 2 | p. 72 |

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| November 2014 | Accounting Technology Blogs | p. 72 |
| October 2014 | Employee Benefit Research Institute | p. 72 |
| September 2014 | Personal Financial Specialists | p. 72 |
| August 2014 | Fast Company | p. 72 |
| July 2014 | Standard and Poor’s Rating Services | p. 72 |
| June 2014 | Chartered Institute of Management Accountants | p. 72 |
| May 2014 | Governmental Accounting Standards Board | p. 72 |
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| March 2014 | Sustainability Reporting Resources | p. 72 |
| February 2014 | North American Securities Administrators | p. 73 |
| January 2014 | Ernst & Young’s IFRS Resources | p. 72 |
| December 2013 | New York State Department of Taxation and Finance | p. 72 |
| November 2013 | Cloud Accounting Round-up | p. 72 |
| October 2013 | Naplia | p. 72 |
| September 2013 | ThinkAdvisor | p. 73 |
| August 2013 | U.S. Government Accountability Office | p. 72 |
| July 2013 | PwC: U.S. GAAP Convergence & IFRS | p. 72 |
| June 2013 | Treasury Inspector General for Tax Administration | p. 73 |
| May 2013 | Chartered Global Management Accountant | p. 72 |
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| March 2013 | Thomson Reuters Tax | p. 72 |
| February 2013 | PCAOB | p. 72 |
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| December 2012 | Tax Professional Organizations | p. 73 |
| November 2012 | Valuation Resources | p. 72 |
| October 2012 | Tax Foundation | p. 72 |
| September 2012 | AdvisorOne | p. 72 |
| August 2012 | Accountability Central | p. 72 |
| July 2012 | International Monetary Fund | p. 72 |
| June 2012 | Accounting Tools | p. 72 |
| May 2012 | NASDAQ.com | p. 72 |
| April 2012 | SECLaw.com | p. 72 |
| March 2012 | IFRS.org | p. 72 |
| February 2012 | Lexis Nexis Tax Law Community | p. 72 |
| January 2012 | Nonprofit Finance Fund | p. 72 |
| December 2011 | Healthcare Financial Management Association | p. 72 |
| November 2011: | Institute for Global Ethics | p. 72 |
| October 2011: | General Accountability Office | p. 72 |
| September 2011: | CNNMoney.com | p. 72 |
| August 2011: | Global Corporate Governance Forum | p. 72 |
| July 2011: | International Federation of Accountants | p. 72 |
| June 2011: | Financial Fraud Law | p. 72 |
| May 2011: | Balanced Scorecard Institute | p. 72 |
| April 2011: | RevenueRecognition.com | p. 72 |
| March 2011: | Federal Reserve | p. 72 |
| February 2011: | Tax.com | p. 72 |
| January 2011: | Nonprofit Accounting Basics | p. 73 |
| December 2010: | Planned Giving Design Center | p. 72 |
| November 2010: | Center for the Public Trust | p. 72 |
| October 2010: | Institute of Internal Auditors | p. 72 |
| September 2010: | Investment Advisor | p. 72 |
| August 2010: | Financial Executives International | p. 73 |
| July 2010: | CPAdirectory | p. 72 |
| June 2010: | StopFraud.gov | p. 73 |
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| September 2009: | Financial Planning | p. 72 |
| August 2009: | Sarbanes-Oxley Compliance Journal | p. 72 |
| July 2009: | International Foundation of Employee Benefit Plans | p. 73 |
| June 2009: | Financial Crimes Enforcement Network | p. 72 |
| May 2009: | ADP Accountant Center | p. 72 |
| April 2009: | Motley Fool’s Personal Finance Center | p. 72 |
| March 2009: | Tax World | p. 72 |
| February 2009: | Multistate Tax Commission | p. 73 |
| January 2009: | Uncle Fed’s Tax Board | p. 72 |
| December 2008: | Tax Foundation | p. 72 |
| November 2008: | Rosen Seymour Shapss Martin LLP | p. 72 |
| October 2008: | WikiCPA | p. 72 |
| Septemwber 2008: | NewRetirement | p. 72 |
| August 2008: | Try XBRL | p. 72 |
| July 2008: | AccountantsWorld | p. 73 |
| June 2008: | Forensic Accounting Websites | p. 72 |
| May 2008: | CPA2Biz | p. 72 |
| April 2008: | 1040.com | p. 73 |
| March 2008: | Smart Money’s Tax Guide | p. 72 |
| February 2008: | BNA Tax & Accounting | p. 72 |
| January 2008 | International Tax Institute | p. 73 |
| December 2007: | Tax Blogs—Roth & Company and TaxProf | p. 72 |
| November 2007: | FierceSarbox | p. 73 |
| October 2007: | myStockOptions.com | p. 73 |
| September 2007: | Benefit Plans Plus | p. 72 |
| August 2007: | Jobs in the Money | p. 73 |
| July 2007: | Camico | p. 72 |
| June 2007: | Accounting Blogs—Accounting Observer and Accountants Round Up | p. 72 |
| May 2007: | Eisner LLP | p. 72 |
| April 2007: | MarketWatch Tax Guide | p. 72 |
| March 2007: | TaxAlamanac | p. 73 |
| February 2007: | Tax History Project | p. 70 |
| January 2007: | Tax Guide for Investors | p. 71 |

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| December 2006: | AICPA’s Tax Center | p. 70 |
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| October 2006: | WebCPA | p. 71 |
| September 2006: | Alliance for Investor Education | p. 71 |
| August 2006: | Association of Certified Fraud Examiners | p. 71 |
| July 2006: | Citrin Cooperman | p. 70 |
| June 2006: | AccountingPage | p. 70 |
| May 2006: | AccountingStudents | p. 70 |
| April 2006: | Findlaw’s Tax Guide | p. 71 |
| March 2006: | National Association of Tax Professionals | p. 71 |
| February 2006: | Small Business Taxes & Management | p. 70 |
| January 2006: | tax.about.com | p. 70 |
| December 2005: | World-Wide Tax.com | p. 70 |
| November 2005: | Practitioners Publishing (PPC) | p. 70 |
| October 2005: | Center for Public Company Audit Firms | p. 70 |
| September 2005: | Yahoo! Finance | p. 70 |
| August 2005: | Camico | p. 70 |
| July 2005: | Kaplan CPA Review | p. 70 |
| June 2005: | Freed Maxick & Battaglia | p. 70 |
| May 2005: | SEC Historical Society | p. 70 |
| April 2005: | Essential Links to Taxes | p. 70 |
| March 2005: | GPO Access | p. 71 |
| February 2005: | Legalbitstream.com | p. 70 |
| January 2005: | Accountants World Tax Center | p. 70 |
| December 2004: | Will Yancey’s Home Page | p. 60 |
| November 2004: | CPA-Exam.org | p. 70 |
| October 2004: | CPAnet | p. 71 |
| September 2004: | National Association of Financial & Estate Planning | p. 71 |
| August 2004: | AIAP Online | p. 72 |
| July 2004: | Financial Wonder | p. 78 |
| June 2004: | Eisner & Lubin LLP | p. 70 |
| May 2004: | SmartPros.com | p. 70 |
| April 2004: | American Institute of Professional Bookkeepers | p. 70 |
| March 2004: | Tax Resources on the Web | p. 70 |
| February 2004: | Tax Talk Today | p. 71 |
| January 2004: | Yahoo Tax Center | p. 70 |

**OTHER
PUBLICATIONS**
(continued)

Monthly “Website of the Month,” Column for *The CPA Journal*, since January 2002. [CPAJ articles are available online at www.cpajournal.com.]

| | | |
|-----------------|--|-------|
| December 2003: | SisterStates Tax Directory | p. 17 |
| November 2003: | PCAOB Online | p. 16 |
| October 2003: | pcaobus.org | p. 13 |
| September 2003: | ihatefinancialplanning.com | p. 15 |
| August 2003: | AuditNet | p. 17 |
| July 2003: | cpa-exam.org | p. 16 |
| June 2003: | Academy of Multidisciplinary Practices | p. 16 |
| May 2003: | LocalAccountingJobs.com | p. 15 |
| April 2003: | Rothstein Kass & Company | p. 12 |
| March 2003: | Federation of Tax Administrators | p. 14 |
| February 2003: | Thomson RIA | p. 20 |
| January 2003: | Tax Analysts | p. 21 |
| | | |
| December 2002: | Tax and Accounting Sites Directory | p. 16 |
| November 2002: | CPACareerNet | p. 17 |
| October 2002: | Accounting Software 411 | p. 19 |
| September 2002: | CPA2biz.com | p. 18 |
| August 2002: | AndersenAlumni.net | p. 17 |
| July 2002: | BDO.com | p. 15 |
| June 2002: | GrantThornton.com | p. 14 |
| May 2002: | CareerBank.com | p. 17 |
| April 2002: | New York State Dept. of Taxation and Finance | p. 16 |
| March 2002: | The Digital Daily | p. 14 |
| February 2002: | Tax Talk Today | p. 14 |
| January 2002: | TaxProBestPractices | p. 11 |

**OTHER
PUBLICATIONS**
(continued)

Abstract Proceedings for the Academy of Business Research, Fall 2017
“The High Price of Tax Credits: Do the Costs Exceed the Benefits?”
with Cortnie Grauel, p. 156 (published November 2017).

Texas Society of CPAs *Industry Issues* Blog
“Replace Yourself,” (May 2017).
<https://industry-issues.com/2017/05/22/1385/>

Wallet Hub *Ask the Experts* Blog
“Student Loans: Ask the Experts,” (May 2017).
<https://wallethub.com/student-loan-calculator/#susan-b-anders>

Abstract Proceedings for the Academy of Business Research, Fall 2016
“Your Tax Dollars at Work: Excess Payouts of Refundable Tax Credits,”
p. 241 (published February 2017).

Tax and Legal Considerations for Those Getting Married, Edward Jones &
Co. (2000).

Tax Issues for Those Getting Divorced, Edward Jones & Co. (2000).

Tax Research: An Annotated Bibliography, Texas Tech University (1996),
Jane O. Burns and Mary Sue Gately, eds.

Giving Away Appreciated Assets, Edward Jones & Co. (1996), with
Mary Sue Gately.

Tax Considerations in Employee Relocations, Edward Jones & Co.
(1996), with Mary Sue Gately.

Barron's Guide to Tax Terms, Barron's Educational Series (1995, 1994),
with D. Larry Crumbley and Jack P. Friedman.

The Tax Consequences of Gambling Activities, Edward Jones & Co.
(1994), with Mary Sue Gately.

Published Letters to the Editor:

The CPA Journal, August 2004, p. 18.

Practical Accountant, August 2004, p. 6.

The CPA Journal, May 2004, p. 21.

**OTHER
PUBLICATIONS**
(continued)

Book Review for *Journal of the American Taxation Association*:
Orzag, Peter R., J. Mark Iwry, and William G. Gale, editors. Aging
Gracefully: Ideas to Improve Retirement Security in America.
Vol. 29, No. 2 (2007), pp. 126-128.

Book Review for *The CPA Journal*:
Stangeland, Kristie. Effective Websites for CPAs: Grow Your Practice
and Profits. July (2007), pp. 16.

Book Review for *Journal of the American Taxation Association*:
Slemrod, Joel and Jon Bakija. Taxing Ourselves: A Citizen's Guide to the
Debate over Taxes. Vol. 27, No. 2 (2005), pp. 94-95.

Book Review for *Journal of the American Taxation Association*:
Steuerle, C. Eugene. Contemporary U.S. Tax Policy.
Vol. 27, No. 1 (2005), pp. 109-110.

“Software Review: Offer in Compromise,” *The CPA Journal*, News and
Views, October (2003), pp. 14-15, with Michael D. Kasperski.

Book Review for *Journal of the American Taxation Association*:
Meyer, B. and D. Holtz-Eakin, eds., Making Work Pay.
Vol. 25, No. 1 (2003), pp. 136-138.

TRAINING VIDEOS

Volunteer Income Tax Assistance Training Videos, September 2014
Created and produced by a group of VITA site coordinators.

Written and produced by Susan Anders:

Overview & Introduction to Education Tax Credits

<https://www.youtube.com/watch?v=svdYPcKxN1s&feature=youtu.be>

Overview of the American Opportunity Tax Credit

https://www.youtube.com/watch?v=JtkDLU_8GkA&feature=youtu.be

Overview of the Lifetime Learning Credit

https://www.youtube.com/watch?v=BvOPYOBIp_0&feature=youtu.be

Overall Limitations on Education Tax Incentives & Considerations

<https://www.youtube.com/watch?v=NIUQkKBi5Dg&feature=youtu.be>

Overview of the Student Loan Interest Deduction

<https://www.youtube.com/watch?v=dIp3OZGhvOM&feature=youtu.be>

The complete set of videos is available at:

<http://www.stcash.org/-supplemental-vita-training-videosresources>

WORK IN PROGRESS

“Tax Software Survey from 2002 to 2017: How Have Practitioners’ Perceptions Changed?” with Carol M. Fischer.

“The High Price of Tax Credits: Do the Costs Exceed the Benefits?” initial presentation at Academy of Business Research (November 2017).

With student, Cortnie Grauel, in fulfillment of her Honors Project.

Received Best Paper Award

Presented at MSU Celebration of Scholarship (April 2018).

With student, Cortnie Grauel, in fulfillment of her Honors Project.

STUDENT PUBLICATIONS

“A Student View of VITA,” *The CPA Journal*, February (2005), pp. 44-47. Patrick E. Doyle, Michael W. Matt, and Bradley T. Owens.

“An Analysis of the State of Accounting Principles and Practices in Latin America,” Samuel R. Orlando. St. Bonaventure University, Honors Project, presented April 16, 2005.

EDITOR Business Research Consortium of Western New York Journals (2009):
Journal of Business
Journal of Education
Journal of Advances in Business
Journal of Advances in Education
Business Review

**EDITORIAL
REVIEW
BOARD** *The CPA Journal*, 2004 to Present
The CPA Journal Annual Max Block Award, 2004 to Present
Academy of Business Disciplines Journal, 2002 to Present
Midwestern Business and Economic Review, 2016 to Present
Business Research Consortium of Western New York Journals (2009):
Journal of Business
Journal of Education
Journal of Advances in Business
Journal of Advances in Education
Business Review

**AD HOC
REVIEWER** Midwestern State University EURECA Proposals (2016 to Present)
American Accounting Association, Annual Meeting (2020)
American Accounting Association, Teaching Learning and Curriculum
Section Mid-Year Meeting (2018)
American Accounting Association, Annual Meeting (2018)
American Accounting Association, Annual Meeting (2017)
Accounting Education, special issue (2016)
Issues in Accounting Education (2015)
Issues in Accounting Education (2014)
American Accounting Association, Annual Meeting (2014)
American Accounting Association, Annual Meeting (2013)
American Accounting Association, Annual Meeting (2011)
American Accounting Association, Annual Meeting (2009)
Business Research Consortium of Western New York (2007)
Business Research Consortium of Western New York (2006)
American Accounting Association, Annual Meeting (2005)
Niagara University Emerging Issues in International Accounting (2005)
American Accounting Association, International Accounting Section
Mid-Year Meeting (2005)
American Accounting Association, Annual Meeting (2004)
American Accounting Association, International Accounting Section
Mid-Year Meeting (2004)

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| AD HOC REVIEWER (continued) | American Accounting Association, Annual Meeting (2003) Niagara University Emerging Issues in International Accounting (2003) <i>The CPA Journal</i> (2003) <i>Journal of Accounting and Finance Research</i> (2002) American Accounting Association, Northeast Regional Meeting (2001) American Accounting Association, Annual Meeting (1999) |
| CONFERENCE ORGANIZER | New York State Department of Taxation and Finance, Consumer Advocate Tax Summit, St. Bonaventure NY, 2013 Business Research Consortium of Western New York St. Bonaventure University, April 2007 |
| CONFERENCE DISCUSSANT | American Accounting Association, Annual Meeting (2020) Teaching, Learning and Curriculum American Accounting Association, Annual Meeting (2018) American Taxation Association Teaching, Learning and Curriculum American Accounting Association, Annual Meeting (2017) American Taxation Association International Accounting Section Teaching, Learning and Curriculum American Accounting Association, Annual Meeting (2016) International Accounting Section American Accounting Association, Annual Meeting (2015) International Accounting Section American Accounting Association, Annual Meeting (2014) American Taxation Association International Accounting Section Teaching, Learning and Curriculum American Accounting Association, Annual Meeting (2013) International Accounting Section Teaching, Learning and Curriculum American Accounting Association, Annual Meeting (2011) International Accounting Section American Accounting Association, Annual Meeting (2009) Integrative, History, and Other International Accounting Section Teaching, Learning and Curriculum Section Business Research Consortium of Western New York (2009) Business Research Consortium of Western New York (2007) Business Research Consortium of Western New York (2006) |

**CONFERENCE
MODERATOR**

American Accounting Association, Annual Meeting (2019)
American Taxation Association
American Accounting Association, Annual Meeting (2018)
Teaching, Learning and Curriculum Section
American Accounting Association, Annual Meeting (2017)
American Taxation Association
International Accounting Section
American Accounting Association, Annual Meeting (2016)
American Taxation Association
International Accounting Section
American Accounting Association, Annual Meeting (2015)
American Taxation Association
International Accounting Section
Teaching, Learning and Curriculum Section
American Accounting Association, Annual Meeting (2014)
International Accounting
Teaching, Learning and Curriculum Section
American Accounting Association, Annual Meeting (2013)
International Accounting
Teaching, Learning and Curriculum Section
American Accounting Association, Annual Meeting (2012)
International Accounting
American Accounting Association, Annual Meeting (2011)
International Accounting
American Accounting Association, Annual Meeting (2010)
International Accounting
American Accounting Association, Annual Meeting (2009)
Integrative, History, and Other
Business Research Consortium of Western New York (2007)
Conference on Emerging Issues in International Accounting (2005)
Taxation and Environmental Issues Session
Conference on Emerging Issues in International Accounting (2003)
Accounting Education in Emerging Markets Session
Conference on Emerging Issues in International Accounting (2002)
Accounting Education and International Issues Session

CONFERENCE PRESENTATIONS “Tax Software from 2002 to 2017: Changes in the Environment and Practitioners’ Perceptions,” Academy of Business Research (March 2018).
Presented by co-author Carol M. Fischer

“The High Price of Tax Credits: Do the Costs Exceed the Benefits?” with student, Cortnie Grauel, in fulfillment of her Honors Project.
Academy of Business Research (November 2017).
Received Best Paper Award

“Your Tax Dollars at Work: Excess Payouts of Refundable Tax Credits,”
Academy of Business Research (November 2016).

“Thank You for Volunteering: the Affordable Care Act and Volunteer Income Tax Assistance,” Business Research Consortium of Western New York (April 2015).

“Incorporating IFRS into the Accounting Curriculum,” Business Research Consortium of Western New York (April 2011).

“Emersion Learning at St. Bonaventure University: Service Learning,”
Association of Franciscan Colleges and Universities (June 2008).

“Encouraging Undergraduate Research,” American Accounting Association Southwest Regional Meeting (March 2008).

“Real Results: Financial Literacy in Action,” Business Research Consortium of Western New York (April 2007).

“Professional Education and Franciscan Values: SBU’s Pacioli Project,”
Association of Franciscan Colleges and Universities (June 2006).

A Descriptive Study of Accounting Principles and Practices in Latin America,” Business Research Consortium of Western New York (April 2006).

“Surveying Professional Accountants: Strategies for Success,” American Academy of Accounting and Finance Annual Meeting (December 2004).

“Using Annual Reports in an International Accounting Course,” Niagara University Emerging Issues in International Accounting (July 2003).

“Mrs. Professor: An Empirical Examination of the Effects of Gender on Students’ Expectations of Their Professors,” Allied Business Disciplines (November 2002).

CONFERENCE PRESENTATIONS (continued) “Mrs. Professor: An Empirical Examination of the Effects of Gender on Students’ Expectations of Their Professors,” American Society of Business and Behavioral Sciences (February 2002).

“An Experiential Learning Exercise: Student Participation in a Survey on Social Security,” American Academy of Accounting and Finance (December 2001).

“Social Security: An Opinion Survey of the Issues and Alternatives,” American Academy of Accounting and Finance (December 2000).

“An Experiment in Active Learning: An Opinion Survey on Social Security,” Allied Business Disciplines (November 2000).

PROFESSIONAL PRESENTATIONS “Professional Ethics Seminar,” for Tulsa Chapter of Accounting and Financial Women’s Alliance, July 2024, via Zoom.

“Handy Technology for CPAs,” for Wichita Falls Chapter of Texas Society of Certified Public Accountants, May 2024.

PRESENTATIONS “Tax Research Techniques: Internet Sites and Tools, Methodology, Documentation and Communication of Results,” Trafford Publishers, December 2019, with Andrea Comeau-Shirley and David Glenn.

**OTHER
PRESENTATIONS**

“Developing Our Students’ Job/Career Readiness” Council of Public Liberal Arts Colleges (COPLAC) Summer Institute (June 2019).
Materials submitted for participants, but not presented due to flight cancellation

“Networking Workshop” for Midwestern State University, Kimball School of Geoscience Bridge & Earth Science Track (BEST) Program, with Thuy Nguyen (June 2018).

“The High Price of Tax Credits: Do the Costs Exceed the Benefits?” with student, Cortnie Grauel, in fulfillment of her Honors Project. MSU Celebration of Scholarship (April 2018).

“EURECA: Value-Added Education,” Midwestern State University Undergraduate Research and Creative Activity Forum (November 2016).

“Overview of the Affordable Care Act,” IRS Volunteer Income Tax Assistance Site Coordinator Training, Corning NY (December 2014).

“Federal Tax Legislation Update,” IRS Tax Practitioner Institute (December 2011).

WebCT Presentation for St. Bonaventure University Faculty Forum (February 2006).

WebCT Presentation for St. Bonaventure University School of Business Colloquium (November 2005).

“Surveying Professional Accountants: Strategies for Success,” Texas Tech University (September 2005).

“Social Security: The Past, the Present, and Options for Reform,” St. Bonaventure University School of Business Research Colloquium (Fall 2005).

“A Brief History of Accounting.” First Class Experience, Spring into Bonaventure (Spring 2005, Spring 2004, Spring 2003).

“Mrs. Professor: An Empirical Examination of the Effects of Gender on Students’ Expectations of Their Professors,” St. Bonaventure University School of Business Research Colloquium (Spring 2003).

“An Active Learning Experiment: Survey on Social Security,” St. Bonaventure University Research Colloquium (Spring 2001).

OTHER PRESENTATIONS (continued) “Social Security: An Opinion Survey of the Issues and Alternatives,” St. Bonaventure University Open House (Fall 2000).
“Does the Earned Income Tax Credit Encourage or Discourage Work Effort: An Empirical Study,” St. Bonaventure University School of Business Research Colloquium (Spring 2000).
“Social Security: An Opinion Survey of the Issues and Alternatives,” St. Bonaventure University School of Business Research Colloquium (Spring 2000).
“The Earned Income Tax Credit,” St. Bonaventure University Research Colloquium (May 1999).

OTHER CONTRIBUTIONS Review of Proposed Master of Science in Taxation for the State University of New York at Old Westbury (November 2005).
Review of Financial Statement Analysis Chapter for *Accounting Concepts and Applications* by Albrecht, Stice, Stice, and Swain. Published by Southwestern-Thomson Publishing (Summer 2003).

RESEARCH CONSULTANT Tax law research concerning bonus depreciation and going concern value for BP successful contest of property tax valuation of Texas City refinery (March 2003).
Tax law research concerning tax-related terms pertaining to real estate for Barron’s Real Estate Dictionary, by Jack P. Friedman (June 2003).
"A Proposal for a Residential Leasehold Land Tax Reform Act: An Evaluation of the Advantages of Reforming the Internal Revenue Code to Qualify Residential Ground Lease Financing for Deductions or Tax Credits," U.S. Department of Housing and Urban Development (May 1, 1995).

**UNIVERSITY
SERVICE**

Midwestern State University

Interim Chair of Accounting and MIS Department, 2016 to 2017
College Council Committee

Faculty Advisor for Volunteer Income Tax Assistance, 2015 to Present
Recruit and train student volunteers (multiple weeks of training)

Chair of Accounting Faculty Search Committee, Spring 2016
Organized applicant submissions and initiated all contacts
Organized selection of candidates for telephone and on-campus interviews
Organized interview questions and responses
Organized candidate itineraries and on-campus visits
Finalized the interview process and made recommendation to Dean

Academic Advisor to Students, Spring 2016 to Present (40 students/year)
Accounting BBAs, Second Bachelors, Accounting MBAs

University Fringe Benefit Committee, Fall 2016 to Present

University Graduate Council Graduate Assistant Matters *Ad Hoc*
Committee, Spring 2017

University Core Curriculum Committee, Fall 2017 to Present

University Admissions Committee, Fall 2017 to Spring 2020

University Service Learning Showcase Committee, Fall 2017 to Present

University Tenure and Promotion Committee, Fall 2019 to Spring 2021

University Website Committee, Fall 2020 to Present

Dillard College Beta Gamma Sigma Advisor, Fall 2019 to Present

Dillard College Delta Sigma Pi Faculty Member, Fall 2019 to Present

Dillard College Tenure and Promotion Committee, Fall 2021 to Present

Student Recruitment Activities, Fall 2015 to Present
Dallas Independent School District College Fair, Sept. 2016, 2017
Mustangs Rally, Fall and Spring, 2015 to Present
Dillard Exchange, Fall and Spring, 2015 to Present

Dillard College Events
Career Fairs, 2015 to Present
Dillard Energy Speaker Series, 2016 to Present
Dillard International Week, 2016, 2017 to Present
Faculty Meetings, Monthly, 2015 to Present
Assurance of Learning Meetings, Fall and Spring, 2015 to Present
College Council Meetings, Fall 2016 to Spring 2017

“Networking Workshop” for Midwestern State University, Kimball
School of Geoscience Bridge & Earth Science Track (BEST) Program,
with Thuy Nguyen (June 2018).

**UNIVERSITY
SERVICE**
(continued)

St. Bonaventure University

Faculty Advisor for Volunteer Income Tax Assistance, 2003 to 2015

Ran an innovative, high-volume retail site that simulates an accounting firm

Received national attention from *The CPA Journal* article, February 2005

Received national attention from the American Taxation Association

Received national attention from the Internal Revenue Service

Received New York State attention from the Office of Temporary and
Disability Assistance—chosen as a state-wide resource

Author training materials and deliver all training to student volunteers

Consistently recruit 25% of Accounting majors to volunteer

60 student volunteers in Spring 2015

Expanded program to reach other parts of Cattaraugus County, 2006

Expanded program to provide taxpayer education, 2007

Organized VITA service trip to Houston, 2007 and 2008

Expanded program to Olean Center Mall, 2008

Returned \$7.17 million in tax refunds to low-income workers, 2004 – 2015

Faculty Advisor for 360 Degrees of Financial Literacy, 2005 to 2009

Received national attention from *The CPA Journal* article, September 2005

Received national attention from the American Institute of CPAs

Received New York State attention from the NYS Society of CPAs

First joint AICPA/NYSSCPA joint financial literacy volunteer certification

Recognized in September 2005 *The Trusted Professional*, p. 9

Authored 30-page instructor manual and 20-page participant manual

Provided monthly seminars for the Everywoman Opportunity Center

Presented 13 seminars to over 80 participants, 2005 – 2009

**Business Research Consortium of Western New York, Member of
Board of Directors, 2007 to 2010**

Chair of Business Research Consortium of Western New York

Promoted, organized, and managed Second Annual Conference at
St. Bonaventure University, April 2007

Attended by 60 participants from 16 colleges

Academic Advisor to Students, 1998 to 2015 (20 to 40 students/year)

Chair of Graduate Council, 2008 to 2010

Graduate Council, 2007 to 2011

School of Business Marketing & Development Committee, 2009 to 2011

Chair of Co-Curricular Subcommittee, 2010 to 2011

Accounting Department Fall Dinner and Spring Awards Dinner

Creator and Organizer, 2007 to 2014

**Faculty Advisor (On Campus Champion) for American Institute of
CPAs Student Members, 2003 to 2015**

Faculty Advisor for New York State Society of CPAs

Student Members, 2003 to 2015

Campus Ambassador for New York State Society of CPAs/

**Foundation for Accounting Education Excellence in Accounting
Scholarship Program, 2006 to 2015**

**UNIVERSITY
SERVICE**
(continued)

St. Bonaventure University (continued)

First Year Experience Advisement Committee, 2007 to 2009
Faculty Advisor for Student Honors Project, 2004 to 2005
Learner Outcomes Assessment Committee for Middle States
Commission Re-accreditation, 2003 to 2005
Faculty Composition and Development/Intellectual Contributions
Committees for AACSB Accreditation, 2002 to 2009
Faculty Evaluation Guidelines Committee, 1999 to 2009
Faculty Status Committee of the Faculty Senate, 2002 to 2005
Faculty Advisor for *BONAccountant*, Student Newsletter,
2004 to 2006
First Class Experience, Spring into Bonaventure, 2003 to 2005
Building and Grounds Committee, 2004 to 2006
Obtained several major improvements to the School of Business Building
Franciscan Values Integration Project, 2002 to 2006
St. Bonaventure University Women in Business Forum, 2003 to 2004
Presentation of Accounting Major to Business Freshmen, Fall 2003
Student Academic Appeal Committee, 2000
Bonaventure Collegium, 1999 to 2003
Summer Orientation Advisor, 1999, 2006 to 2009

**OTHER
SERVICE**

Volunteer Income Tax Assistance Volunteer, 2003 to Present
North Texas Area Volunteer Income Tax Assistance Coalition
United Way (Wichita Falls, TX), 2015 to Present
Financial Literacy Volunteer, 2005 to Present
Texas Society of CPAs
Faculty Ambassador, 2021 to Present
Chapter Coordinating Steering Subcommittee, 2021 to Present
Branding and Community Outreach Committee, 2021 to Present
Pipeline Task Force, 2021 to Present
Wichita Falls Chapter of Texas Society of CPAs, May 2017 to 2021
Board of Directors
Treasurer, Secretary, President-elect, President, Past-President
American Accounting Association
Membership Advisory Committee, Fall 2020 to Present
American Accounting Association New Member Mentor, 2010 to present
American Taxation Association Representative to Internal Revenue
Service VITA Program TaxWise Pilot Class, 2005
American Taxation Association Committees:
Pro Bono Services (VITA) Task Force, 2006 to 2008
External Relations Committee, 2006 to 2008
Research Resources and Methodologies Committee, 2007 to 2008
Tax Accounting Methods and Periods Committee, 2002 to 2006
Chair of Tax Accounting Methods and Periods Committee, 2003 to
2004
AAA International Section: Teaching and Curriculum Committee of the
AAA International Section, 2003 to 2008
AWSCPA: Tax Matters Committee, 2003 to 2008
Lay Representative to Annual Conference for Church, 2005 to 2015
Chair of Pastor Parish Relations Committee for Church, 2009 to 2011
Finance Committee for Church, 2005 to 2015
Audio/Visual Operator for Church, 2005 to 2015
Usher for Church, 2005 to 2010
Pastor Parish Relations Committee for Church, 2001 to 2015
Capital Fund Committee for Church, 2001 to 2004
Communion Service Committee for Church, 2000 to 2004
Volunteer for Greater Olean Association of Churches, 1998 to 2002

GRANTS

McQuade Center for Accounting Excellence Grant, 2013
PricewaterhouseCoopers INQUIRIES Grant, 2011
PricewaterhouseCoopers IFRS Ready Grant, 2010
Pacioli Summer Research Grant, 2009
St. Bonaventure University Technology Grant, 2007
Students in Free Enterprise (SIFE) Financial Literacy Grant, 2007
Lilly Foundation Journey Project Sub-Grants, 2007
 Volunteer Income Tax Assistance
 360 Degrees of Financial Literacy
Lilly Foundation Journey Project Sub-Grants, 2006
 Volunteer Income Tax Assistance
 360 Degrees of Financial Literacy
St. Bonaventure University WebCT Grant, 2005
St. Bonaventure University Faculty Research Grant, 2003

HONORS AND AWARDS

Profiled by Texas Society of Certified Public Accountants
as one of 100 business and industry members recognized, May 2016
<https://industry-issues.com/wichita-falls/>
Francis Medal for VITA from Province of the Most Holy Name of Jesus,
Order of Friars Minor, 2008
Max Block Distinguished Article Award 2006 from NYSSCPA, 2007
Donald L. Korben Community Service Award, for VITA, 2007
Texas Tech Summer Dissertation Award, 1997
Belverd Needles Fellowship, 1997
Laurels Fund Scholarship, 1997
AAA Doctoral Consortium, 1995
Burke Scholar and Fellowship, 1993-1996

PROFESSIONAL MEMBERSHIPS

American Accounting Association (AAA)
Accounting Program Leadership Group Section of AAA
American Taxation Association (tax section of AAA)
International Accounting Section of AAA
Teaching Learning and Curriculum Section of AAA
National Tax Association
American Institute of Certified Public Accountants
American Woman's Society of CPAs (now part of AICPA)
New York State Society of CPAs
Texas Society of CPAs
Accounting & Financial Women's Alliance
Association of Latino Professionals for America
Council of Petroleum Accountants Society (COPAS)

**PROFESSIONAL
DEVELOPMENT**

Texas Society of CPAs Annual Meeting, Frisco 2024
American Accounting Association Annual Meeting, Denver 2023
Texas Society of CPAs Annual Meeting, Fort Worth 2023
American Accounting Association Annual Meeting, Virtual 2022
Ernst & Young Foundation Tax Educators Symposium, Virtual 2021
American Accounting Association Annual Meeting, Virtual 2021
American Accounting Association Annual Meeting, Conference on
Teaching and Learning in Accounting, Virtual 2021
American Accounting Association CPA Evolution Model Curriculum
Launch, Virtual June 2021
Texas Society of CPAs Annual Meeting, Virtual 2021
Ernst & Young Foundation Tax Educators Symposium, Virtual 2020
American Accounting Association Annual Meeting, Virtual 2020
American Accounting Association Spark Conference, Virtual June 2020
Texas Society of CPAs Annual Meeting, Virtual 2020
American Accounting Association Annual Meeting, San Francisco CA, 2019
Texas Society of CPAs Annual Meeting, New Orleans LA, 2019
American Accounting Association Annual Meeting, Washington DC, 2018
Texas Tech University, Accounting Ph.D. Alumni Workshop, Lubbock
TX, October 2017
American Accounting Association Annual Meeting, San Diego CA, 2017
Texas Society of CPAs, Oil and Gas Tax Fundamentals, Fort Worth TX, 2017
Texas Society of CPAs, Leadership Day, Dallas TX 2017
American Accounting Association Annual Meeting, NYC NY, 2016
American Accounting Association Annual Meeting, Chicago IL, 2015
IRS Volunteer Income Tax Assistance Site Coordinator Training,
Corning NY, 2014
Ernst & Young Foundation Tax Educators Symposium, Washington DC, 2014
American Accounting Association Annual Meeting, Atlanta GA, 2014
Became a Chartered Global Management Accountant, 2014
IRS Volunteer Income Tax Assistance Site Coordinator Training,
Horseheads NY, 2013
Ernst & Young Foundation Tax Educators Symposium, Washington DC, 2013
New York State Department of Taxation and Finance, Consumer
Advocate Tax Summit, St. Bonaventure NY, 2013 (Served as host)
American Accounting Association Annual Meeting, Anaheim CA, 2013
Learninghouse Foundations in Online Delivery, BP 501, 2013
Certified to teach online
IRS Volunteer Income Tax Assistance Site Coordinator Training,
Buffalo NY, 2012
Ernst & Young Foundation Tax Educators Symposium, Washington DC, 2012
IRS Volunteer Income Tax Assistance Site Coordinator Training,
Corning NY, 2012
American Accounting Association Annual Meeting, Washington DC, 2012

**PROFESSIONAL
DEVELOPMENT
(continued)**

IRS Tax Practitioners Seminar, St. Bonaventure University, 2011
IRS Volunteer Income Tax Assistance Site Coordinator Training,
Ithaca NY, 2011
Ernst & Young Foundation Tax Educators Symposium, Washington DC, 2011
American Accounting Association Annual Meeting, Denver CO, 2011
IRS Tax Practitioners Seminar, St. Bonaventure University, 2010
IRS Volunteer Income Tax Assistance Site Coordinator Training,
Ithaca NY, 2010
Ernst & Young Foundation Tax Educators Symposium, Washington DC, 2010
American Accounting Association Annual Meeting, San Francisco CA, 2010
Completed Requirements to Become a New York State CPA, 2009
IRS Volunteer Income Tax Assistance Site Coordinator Training,
Rochester NY, 2009
Ernst & Young Foundation Tax Educators Symposium, Washington DC, 2009
American Accounting Association Annual Meeting, New York NY 2009
American Taxation Association Mid-Year Meeting, Orlando FL 2009
IRS Volunteer Income Tax Assistance Site Coordinator Training, Ithaca
NY, 2008
IRS Tax Practitioners Seminar, St. Bonaventure University, 2008
Franciscan Intellectual Journey Seminar, 2008
IRS Tax Practitioners Seminar, St. Bonaventure University, 2007
American Accounting Association Annual Meeting, Chicago IL, 2007
PwC University for Faculty, PricewaterhouseCoopers, Princeton NJ, 2007
American Accounting Association Annual Meeting, Washington DC, 2006
Designing and Teaching a Capstone Course, 2006
Internal Revenue Service VITA Program TaxWise Pilot Class, 2005
Representing the American Taxation Association
American Taxation Association Mid-Year Meeting, American Taxation
Association, Washington DC, 2005
Understanding Franciscan Origins and Values, graduate course,
2004 to 2006
Faculty Development in International Accounting, University of South
Carolina, 2004
Defining Intended Learning Outcomes in Colleges and Universities
Workshop, 2004
American Accounting Association Annual Meeting, Honolulu HI, 2003
Elementary Spanish 101-102, 2003
Universal Design for Living Workshop, 2003
Build with Living Stones—Franciscan Institute, 2003
American Taxation Association Mid-Year Meeting, American Taxation
Association, St. Petersburg FL, 2003

**PROFESSIONAL
DEVELOPMENT**
(continued)

Franciscan Values Integration Project Retreat, 2002
Continuing Education in International Accounting, American Accounting
Association, 2002
Faculty Development in International Business, University of South
Carolina, 2002
Workshop on Team Dynamics: Enhancing Your Students' Experience,
2002
Keenan Grant Computer Faculty Development Workshops, 2001
Instructor and Participant
Keenan Grant Faculty Development Workshop—What Motivates
Freshmen? 2001
Classroom Assessment Workshops, 2001
Teaching Luncheons, 2000 – 2001