

Cynthia Elaine Bolt

The Citadel
Full Professor
Accounting and Finance
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Professional Positions

Professor, The Citadel - Tommy and Victoria Baker School of Business (Charleston, SC, Accounting and Finance. (August 15, 1990 - Present).

Consulting-Financial Services, Cynthia E. Bolt CPA. (January 1, 2023 - Present).

CPA Exam Author, Uniform CPA Exam. (2009 - 2012).

Tax Senior including Audit Engagements, Ernst and Young, LLP. (1989 - 1992).

Auditing Staff, Deloitte Touche. (1988 - 1989).

Consulting, South Carolina Federal Bank. (1987 - 1988).

Professional Staff, Boswell, CPA's (now Dixon Hughes Goodman). (1983 - 1987).

Department Head, Accounting & Finance, Department, approximately 500 hours spent per year. (July 1, 2020 - June 30, 2022).

Business Scholars Director, College, approximately 100 hours per year. (February 2017 - June 30, 2020).

Education

MS, University of South Carolina

Major: Taxation

Supporting Areas of Emphasis: Principles of College Teaching (Doctoral level research course: USC School of Education)

BS, University of North Carolina

Major: Accounting

Supporting Areas of Emphasis: Business

Licensures and Certifications

CPA, AICPA. (June 1984 - Present).

Advanced Online Teaching Certificate, CEITL-DE. (October 2024).

Data Analytics Core Concepts Certificate, AICPA. (January 2022 - 2022).

CGMA. (December 2014 - 2021).

Professional Memberships

South Carolina Certified Public Accountant.

AAA Teaching Learning and Curriculum Section. (August 2014 - Present).

American Accounting Association. (2001 - Present).

Beta Gamma Sigma. (1988 - Present).

American Institute of CPA's. (January 1984 - Present).

South Carolina Association of CPA's. (January 1983 - Present).

Accounting Program Leader's Group. AAA. (January 2021 - August 31, 2022).

Southeastern American Accounting Association. (2010 - 2015).

Member, Citadel Academy for the Scholarship of Teaching, Learning and Evaluation. (2002 - 2015).

Student Liaison, Coastal Chapter SCACPA. (1985 - 2000).

Awards and Honors

Col. Marion S. Lewis Faculty Excellence in Teaching Award, Baker School of Business. (April 15, 2025).

CTP Professor of the Year 2025, Baker School of Business. (April 1, 2025).

CTP Professor of the Year 2024, Baker School of Business. (May 2024).

CTP Professor of the Year 2023, Baker School of Business. (May 2023).

Nominated for: Faculty Awards: Teaching, Service, Research, Nominated for teaching, service & research awards. (March 2023).

Undergraduate/Day Program Professor of the Year, Baker School of Business. (May 2020).

Nominated for: Citadel Campus-wide Service Award, The Citadel. (March 2020).

The Tax Adviser 2017 Best Article Award. (August 1, 2018).

Undergraduate Professor of the Year, Baker School of Business. (May 2018).

TLC Leadership, Initiative and Service Award 2017, Teaching Learning & Curriculum Section of the American Accounting Association. (August 7, 2017).

Best Paper Award: Midwest Region, American Accounting Association: Teaching, Learning & Curriculum Section. (October 2015).

Best Paper Award: Southeast Region, American Accounting Association: Teaching, Learning & Curriculum Section. (April 4, 2012).

Best Paper Award: Accounting Horizons, American Accounting Association. (August 2009).

South Carolina Educator of the Year, South Carolina Association of Certified Public Accountants. (2001).

Consulting

Litigation, Estate Planning Consultation, Charleston, SC. (January 2, 2024 - October 28, 2024).

Non-Governmental Organization (NGO), SC Coastal Conservation League - Consultant - Accounting Processes, Charleston, SC. (November 13, 2023 - July 1, 2024).

Government, Santee Cooper, Moncks Corner. (August 2008).

Media Appearances and Interviews

"The Certainty of Death and Taxes: What the Statics Reveal After 230 Years," Charleston Regional Business Journal. (May 2020).

Publications

Bolt, C. (accepted). Integrating AI into Accounting Education: Developing Writing Skills to Navigate Regulatory Complexity. (2025) *International Journal of Innovation and Learning*.

Bolt, C. (2024). IRS Data Reveals Insights into Collections, Compliance, and Criminals. *Journal of Accountancy*, Volume 237(6).

Bolt, C., & Plummer, E. (2023). INSIGHTS FOR TAX SPECIALISTS ON REASONABLE COMPENSATION, CASH TAX SAVINGS, AND EXECUTIVE COMPENSATION. *The Journal of Taxation*, 138(2), 27–34. <https://store.tax.thomsonreuters.com/accounting/c/Journal-of-Taxation/p/100201249>

- Bolt, C., & Marshall, L. M. (2022). A NEUROEDUCATION AND COGNITIVE LEARNING-BASED STRATEGY TO DEVELOP ACTIVE LEARNING PEDAGOGIES FOR ACCOUNTING. *The Accounting Educators' Journal*, 32, 1–35. <https://www.aejournal.com/ojs/index.php/aej/article/view/689>
- Bolt, C. (2021). Developments in Research-Based Instructional Strategies: Learning-Centered Approaches for Accounting Education. *Journal of Business Education and Scholarship of Teaching.*, 15(2), 1–14.
- Bolt, C., & Plummer, E. (2021). Practical highlights of recent tax research. *The Tax Adviser*. Published. <https://www.thetaxadviser.com/issues/2021/apr/highlights-recent-tax-research.html>
- Bolt, C. (2020). Accounting education research reveals benefits of active learning strategies in the classroom. In C. Vien (Ed.), *Journal of Accountancy*. AICPA. https://www.journalofaccountancy.com/newsletters/extra-credit/benefits-of-active-learning-strategies-in-classroom.html?utm_source=mnl:extracredit&utm_medium=email&utm_campaign=10Nov2020&SubscriberID=121864924&SendID=322220
- Bolt, C., Showalter, S., & Chen, A. (2019). Highlights of Internal Audit Research. *Journal of Accountancy*. Published. <https://www.journalofaccountancy.com/issues/2019/jul/internal-audit-research.html>
- Bolt, C., & Marshall, L. (2017). "Fraud Mini-Cases: An Active Learning Pedagogy to Enhance Student Competencies in Financial Accounting Principles". *Global Perspectives in Accounting Education*, 13. <https://gpae.wcu.edu/wp-content/uploads/2017/05/FraudMiniCases.pdf>
- Bolt, C., Chambers, V., & Elzweig, B. (2017). The Effect of a Taxpayer Advocate Order on Tolling the Taxpayer Statute of Limitations. *Oklahoma City University Law Review*, 41(3), 50. <http://law.okcu.edu/wp-content/uploads/2017/05/OCULREV-Fall-2016-Chambers-et-al.-119-153.pdf>
- Bolt, C., & Elizabeth, P. (2017). The Preparer Penalties of Sec. 6694 and Sec. 6695. *The Tax Adviser*, February 2017. www.thetaxadviser.com/issues/2017/feb/preparer-penalties-sec-6694-6695.html?utm_source=mnl:taxinsider&utm_medium=email&utm_campaign=02Feb2017
- Bolt, C., & Swain, M. (2017). Highlights of Management Accounting Research. *Journal of Accountancy*. Published. <http://www.journalofaccountancy.com/issues/2016/dec/management-accounting-research.html>
- Bolt, C. E. (2016). Integrating Fraud in the Introductory Financial Accounting Course. *Accounting Instructor's Report: A Journal for Accounting Educators*, Fall 2016. http://blog.cengage.com/wp-content/uploads/2016/12/Fall-2016_AIR_Bolt-Lee_Integrating-Fraud-in-the-Introductory-Accounting-Course.pdf
- Bolt, C. E. (2016). Uncovering Majority Shareholder Fraud in a Closely Held Corporation: A Case Study to Develop Forensic/Tax Investigative Skills. *Journal of Forensic and Investigative Accounting*, 8(2).
- Bolt, C. (2016). Suspicions of Money Laundering: Exclusive Restaurant or a Front for Illegal Gambling?. In Crumbley, LaGraize, & Peters (Eds.), *CCH Case Studies in Forensic Accounting and Fraud Accounting* (Second Edition). CCH Case Studies.
- Bolt, C. (2016). *Case Study: Exclusive Restaurant or a Front for Illegal Gambling?*. Case Studies on Fraud & Forensics.
- Bolt, C. (2016). Case study -- Cash Basis Small Businesses: When the IRS Examines for Underreporting. In Crumbley, LaGraize, & Peters (Eds.), *CCH Case Studies in Forensic Accounting and Fraud Accounting* (Second Edition). CCH Case Studies.
- Bolt, C. (2016). *New Exclusion Laws for Restitution from Wrongful Incarceration*. The Tax Adviser.
- Bolt, C., & Kern, S. (2015). Highlights of Fraud Research. In *Journal of Accountancy: Vol. 220* (5th ed., pp. 40–45). www.journalofaccountancy.com/issues/2015/nov/fraud-research.html
- Simmons, S., Bolt, C., & Jones, W. (published). The Major Field Test in Business: A Direct Measure of Learning in Common Business Disciplines (2014). In J. L. Morrison (Ed.), *Journal of Education for Business: Vol. 90* (2nd ed., pp. 57–62).

- Bolt, C., Zimmerman, A. B., & Wu, Y. (2014). Highlights of Ethics Research. In K. Milten (Ed.), *Journal of Accountancy: Vol. 217* (6th ed., pp. 34–39).
www.journalofaccountancy.com/Issues/2014/Jun/20139009.htm
- Bolt, C., & Plummer, E. (2013). Highlights of Tax Research. In *Journal of Accountancy: Vol. 214* (1st ed.).
<http://www.journalofaccountancy.com/Issues/2013/Jul/20137329.htm>
- Moehrle, S., Bolt, C., Reynolds-Moehrle, J., & Williams, T. (2013). Developments in Accounting Regulation: A Synthesis and Annotated Bibliography of Evidence and Commentary in the 2010 Academic Literature. In *Research in Accounting Regulation: Vol. 25* (1st ed., pp. 53–76).
<http://www.sciencedirect.com/science/article/pii/S1052045712000550>
- Bolt, C., & Showalter, S. (2012). Highlights of Auditing Research. In *Journal of Accountancy: Vol. 1* (214th ed.).
<http://www.journalofaccountancy.com/Issues/2012/Jul/20125104.htm>
- Bolt, C., Moehrle, S., & Farber, D. (2011). Highlights of Corporate Governance Research. In *Journal of Accountancy: Vol. 212* (3rd ed.).
- Bolt, C., & Moody, J. (2010). Highlights of Finance and Accounting Ethics Research. In *Journal of Accountancy* (October, Vol. <http://www.journalofaccountancy.com/Issues/2010/Oct/20102896>, pp. 38–41).
<http://www.journalofaccountancy.com/About/>
- Moehrle, S. R., Bolt, C., Anderson, K. L., Debreceny, R. S., Dugan, M. T., Hogan, C. E., Maher, M. W., & Plummer, E. (2009). The Impact of Academic Accounting Research on Professional Practice: An Analysis by the AAA Research Impact Task Force. In *Accounting Horizons: Vol. 23* (4th ed., pp. 411–156).
- Bolt, C., & Moody, J. (2009). Change in the Taxpayer-Tax Preparer Relationship: The Effects of Circular 230. In *Journal of Legal, Ethical, and Regulatory Issues: Vol. 12* (1st ed.).
- Bolt, C., & Smith, M. L. (2009). Highlights of IFRS Research. In *Journal of Accountancy: Vol. 208* (5th ed., pp. 48–52).
- Bolt, C., & Moody, J. (2008). "Highlights of Accounting Systems Research. In *Journal of Accountancy: Vol. 206* (6th ed.).
- Bolt, C. (2007). Case Studies for Introductory Tax: Integrating Research and Ethics. In *Research on Professional Responsibility and Ethics in Accounting: Vol. 11* (pp. 207–225).
- Bolt, C., & Foster, S. (2003). The Core Competencies Framework: A New Element in the Continuing Call for Accounting Education Change. In *Accounting Education: An International Journal*.
- Bolt, C. (2002). *Book Review: Financial Accounting: A Business Process Approach*. Issues in Accounting Education.
- Bolt, C., Moody, J., & Stewart, B. (2002). Showcasing the Skilled Business Graduate: Expanding the Toolkit. In *Business Communication Quarterly*.
- Bolt, C., & Foster, S. (2000). Examination Retakes in Accounting: Increased Learning by Writing After the Exam. In *Language and Learning Across the Discipline*.

Presentations

- Bolt, C., SC Association of Accounting Educators, "Strategic Teaching in a Changed Cognitive Landscape," College of Charleston, Charleston. (February 20, 2026).
- Bolt, C., American Accounting Association CTLA, "Cultivating Engaged and Accountable Learners in the Accounting Classroom: Strategies for Enhancing Student Success," Chicago. (August 2025).
- Bolt, C., Conference on Teaching & Learning Accounting AMER ACCTG ASSN, "Leveraging Artificial Intelligence To Introduce Students to Auditing Standards," Chicago. (August 2025).
- Bolt-Lee, C. (. (Presenter/Author), American Accounting Association Teaching, Learning & Curriculum Conference, "Empowering Students through Benevolence and Goodwill," American Accounting Association, Washington, DC. (October 20, 2023).

- Bolt, C., Teaching Learning & Curriculum, "Incentivized Learning: Motivating by Making Student Learning Count," American Accounting Association, San Antonio, TX. (October 30, 2021).
- Bolt, C., Teaching Learning & Curriculum, Mid-Year Conference, "Scaffolding: Building that A-Ha Moment by Connecting Prior Knowledge to New Knowledge," American Accounting Association, online. (November 5, 2020).
- Bolt, C., 17th Annual Accounting Educators Conference, "Engaging Students in Active Learning," Arkansas Society of CPAs, Online (scheduled for Little Rock), AK. (May 13, 2020).
- Bolt, C., 17th Annual Educators Conference, "KEYNOTE PRESENTATION: An Overview of Best Practices in Accounting Education from Research and Master Teachers," Arkansas Society of CPA's, Virtual (supposed to be in Little Rock K, AR. (May 13, 2020).
- Bolt, C., American Accounting Association, "Keeping Current with Emerging Technology in the Accounting Profession through Student Pecha Kuchas," Teaching Learning & Curriculum Section Midyear Meeting, Tampa, FL. (November 2019).
- Bolt, C., American Accounting Association, "Highlights of Accounting Education Research: Using the Scholarship of Teaching to Develop a Learned Profession," Teaching Learning & Curriculum Section, Tampa, FL. (November 8, 2019).
- Bolt, C., Barrett, R. (Panelist), American Accounting Association, "Developing & Delivering Quality Online and Hybrid Courses," Annual Meeting, San Francisco, CA. (August 14, 2019).
- Bolt, C., Louisiana Accounting Educators, "Accounting Education: An Overview of Best Practices from Research and Master Teachers," Louisiana Society of CPAs, Baton Rouge, LA. (April 5, 2019).
- Bolt, C., Teaching Learning and Curriculum MidYear Meeting, "Teaching Challenging Accounting Concepts in Introductory Classes: Using Short Case Studies Based on Theories from Neuroscience," American Accounting Association, Dallas, TX. (November 9, 2018).
- Bolt, C., Conference on Teaching and Learning Accounting, "Using Fraud Cases to Engage Students in Active Learning," American Accounting Association, DC, WA. (August 4, 2018).
- Bolt, C., Southeast Region Meeting, "Internal Control Observations: What do Students Notice in the Real World?," American Accounting Association, Greenville, SC. (April 2018).
- Bolt, C., Southeast Region Meeting, "Sharing Best Teaching Practices Panel - Classroom Engagement Using Worksheets to Practice Problems," American Accounting Association, Greenville, SC. (April 2018).
- Bolt, C., CTLA, "Tackling Teaching Together," American Accounting Assoc, San Diego. (August 2017).
- Bolt, C., American Accounting Association Annual Meeting, "Unique Twists to Quizzes to Enable Student Learning, Retention and Motivation," American Accounting Assoc, San Diego. (August 2017).
- Bolt, C., Emerging Learning Strategies - Annual Meeting, "Tax Research," American Accounting Assoc, San Diego. (August 7, 2017).
- Bolt, C., CASTLE, "Collaborative Teaching Techniques," The Citadel, Campus. (April 5, 2017).
- Bolt, C., APLG (Assoc. of Program Leaders in Accounting - Deans/Dept Heads), "Academic Research Initiatives for Professionally Oriented Faculty," American Accounting Assoc, Phoenix, AZ. (February 2017).
- Bolt, C., Conference on Teaching & Learning Accounting, "Collaborative Teaching Strategies -Tackling Teaching Together," American Accounting Association, City, NY. (August 2016).
- Bolt, C., Southeast AAA, "Teaching Auditing Risk," American Accounting Association, Atlanta. (April 2016).
- Bolt, C., Fogarty, T. (Presenter), Churyck, N., Rupert, T., Teaching, Learning & Curriculum Webinar, "Alternatives in Publishing Accounting Education," American Accounting Association, Online Webinar. (March 2016).
- Bolt, C., Midwest AAA, "A Case Study on Majority Shareholder Fraud in a Closely Held Corporation," American Accounting Association, St. Louis, MO. (October 2015).

- Bolt, C., Hartley, C. (Panelist), Midwest AAA, "Enhancing Student Learning Through Quizzes," American Accounting Association, St. Louis, MO. (October 2015).
- Bolt, C., Showalter, S. (Panelist), Sobieski, C. (Coordinator/Organizer), SEAAA, "Recent Events & Activities: Keeping Up-to-Date / Keeping Accounting and Auditing Class Content Current and Relevant," American Accounting Association, Asheville. (April 2015).
- Bolt, C., SEAAA, "Tackling Teaching Together," American Accounting Association, Asheville. (April 2015).
- Bolt, C., Conference on Teaching and Learning Accounting, "Resources for New Faculty-An Introduction to Academic Publishing," American Accounting Association, Atlanta, Georgia. (August 3, 2014).
- Bolt, C., Conference on Teaching and Learning Accounting, "Tackling Teaching Together," American Accounting Association, Atlanta, Georgia. (August 2, 2014).
- Bolt, C. (Moderator), Southeast American Accounting Association, "Challenges with Two Year Colleges," American Accounting Association, St. Petersburg. (April 2014).
- Saracina, T., Bolt, C., Godfrey, E., Southeast American Accounting Association, "Debits & Credits vs. Financial Statement Users Approach Does the teaching approach affect Financial Accounting Student's Success Rates?," American Accounting Association, St. Petersburg. (April 5, 2014).
- Bolt, C., American Accounting Association Annual Meeting, "Ways to Get Involved in the Teaching, Learning and Curriculum Section," American Accounting Association, Anaheim, CA. (August 2013).
- Bolt, C., Crosson, S., Southeast American Accounting Association, "Tackling Teaching Together," Nashville. (April 2013).
- Bolt, C., 2013 International Conference, "Uncovering Majority Shareholder Fraud in a Family Owned S Corporation," Maui, HI. (April 2013).
- Bolt, C., Conference on Teaching and Learning Accounting, "Tackling Teaching Together," American Accounting Association, Washington, DC. (August 2012).
- Bolt, C., SEAAA, "Introductory Financial Accounting: Teaching from a Fraud Perspective," American Accounting Association, Savannah. (April 2012).
- Bolt, C., Crosson, S., SEAAA, "Tackling Teaching Together," Savannah. (April 2012).
- Bolt, C., Conference on Teaching and Learning Accounting, "Tackling Teaching Together," American Accounting Association, Denver, CO. (August 2011).
- Bolt, C., Conference on Teaching and Learning Accounting, "Instructional Strategy Forum; Best Practices from the Audience," American Accounting Association, San Francisco. (August 2010).
- Bolt, C., Western Region AAA, "Linking Accounting Research, Practice and Higher Education: Student Assignments," American Accounting Association, Portland, OR. (April 2010).
- Bolt, C., American Accounting Association Research Impact along with the AACSB Research Impact committee, "The Impact of Research," OH. (May 2009).
- Bolt, C., American Society of Business and Behavioral Sciences, "Managerial Accounting: A Demonstration of Equivalent Units in Process Costing," Las Vegas, NV. (February 2009).
- Bolt, C., Conference on Teaching and Learning Accounting, American Accounting Association, Anaheim, CA. (August 2008).
- Bolt, C., Moehrle, S., Anderson, K., Ayres, F., Debreceny, R., Dugan, M., Hogan, C., Maher, M., Plummer, E., American Accounting Association National Meeting, "The Cup is (More Than) Half Full: The Impact of Academic Accounting Research on the Professional Practice of Auditing, Tax, and Accounting," Research Impact Task Force, Orange County, CA. (August 2008).
- Bolt, C., Recruiting Professionally Qualified Accounting Faculty, AAA Continuing Professional Education, C, NY. (April 2008).

- Bolt, C., Allied Academies International Conference, "Changes in the Taxpayer-Tax Prepare Relationship: The Effects of Circular 230," Reno, NV. (October 2007).
- Bolt, C., AAA Northeast Region Meeting, "Current Audit Research: Lessons for Practice from Academe." (April 2007).
- Bolt, C., American Society of Business and Behavioral, "Linking Academic Research and the Accounting Practitioner through Student-Prepared Practitioner Summaries," Las Vegas, NV. (February 2007).
- Bolt, C., American Accounting Association Annual Meeting, "Auditing and Assurance Services: Bridging the Gap between Research and Practice," Washington, DC. (August 2006).
- Bolt, C., Midwest American Accounting Association, "Ethics Standards for the Professional Tax Practice: New Developments," Chicago. (March 2006).
- Bolt, C., 2005 International Allied Academies, "Circular 230 and the Statements of Standards for Professional Tax Practice," Las Vegas, NV. (October 2005).
- Bolt, C., Annual meeting of the American Accounting Association, "Case Studies for Introductory Tax: Integrating Research with Ethics," San Francisco, CA. (August 2005).
- Bolt, C., Powell, R. W., Seventh Annual Ethics Colloquium, "Ethical Issues in Professional Tax Practice," San Francisco, CA. (August 2005).
- Bolt, C., Northeast Regional American Accounting Association, "Expenses of Education: Deduction for Advanced Business Degrees." (April 2005).
- Bolt, C., Carnegie Academy for the Scholarship of Teaching and Learning, "Assurances of Learning and Outcome Assessment: Integrating Accreditation with The Scholarship of Teaching and Learning," Atlanta, GA. (March 2005).
- Bolt, C., Regional Mid-Atlantic AAA meeting, "Case Studies for Introductory Tax: Integrating Research with Ethics," Philadelphia. (March 2005).
- Bolt, C., Carnegie Academy for the Scholarship of Teaching and Learning, "Student Retention: Taking Another Look. Integrating Ethics Education into the Curriculum," San Diego. (April 2004).
- Bolt, C., Teaching and Learning Conference, "Examination Retakes and Learning Retention," Orlando. (January 2004).
- Bolt, C., MidAtlantic American Accounting Association, "Integrating Ethical Development Issues in the Auditing Classroom: A Survey of Current Practice," Philadelphia, PA. (March 2003).
- Bolt, C., Second Annual Charleston Connections Conference: Innovations in Higher Education, "Assessment Alternatives: Two-part Exams for Testing Multiple Levels of Student Learning," Charleston, SC. (May 2002).
- Bolt, C., Mid-Atlantic AAA Conference, "Testing the Profession's Requisite Competencies: Accounting Education Frameworks and the Proposed Modifications to the CPA Exam," Mid-Atlantic AAA, Baltimore, MD. (April 2002).
- Bolt, C., Writing Across the Curriculum, "Writing for the Real-World: Discipline-Specific Assignments in Accounting," na State University, India. (June 2001).
- Bolt, C., Foster, S., Southeastern American Accounting Association, "Accounting Education: Still in a State of Change," Tampa, FL. (April 2001).
- Bolt, C., Writing across the Curriculum, "Exam Retakes: Increased Learning by Writing After the Exam," Cornell University. (June 5, 1999).

Research Activity

"Tax Cases - An introduction to tax research" (Planning). (October 2025 - Present).

This paper examines pedagogical strategies for cultivating introductory tax research competencies among contemporary undergraduate learners, with particular emphasis on the interpretation and application of primary authoritative sources. It argues that today's student population, shaped by digital

learning habits and limited prior exposure to statutory analysis, benefits from structured scaffolding that demystifies the Internal Revenue Code, Treasury Regulations, and administrative guidance. Using a framework informed by cognitive load theory and experiential learning, the paper demonstrates how instructors can guide students to connect factual scenarios and tax issues to relevant legal authority through iterative inquiry. The proposed approach foregrounds the development of legal reasoning by emphasizing issue identification, rule extraction, and analogical application. Additionally, the paper highlights the pedagogical effectiveness of integrating research databases and guided practice to enhance students' procedural fluency in navigating the tax law hierarchy. Empirical observations suggest that explicit modeling of research heuristics, paired with collaborative problem-solving, significantly improves students' ability to synthesize complex information. The paper concludes that systematic, research-centered instruction not only strengthens technical competency but also fosters deeper professional judgment. Ultimately, this work contributes to ongoing discourse on tax education by offering an evidence-based model for preparing students to engage meaningfully with authoritative tax materials.

"Leveraging Artificial Intelligence to Introduce Students to Auditing Standards" (Complete). (October 2023 - Present).
Classroom Instructional Strategy with Evidence-Based Outcomes.

"The Adrian Project" (On-Going). (June 2022 - Present).
Descriptive article on experiences with The Adrian Project, coordinating with the IRS Office of Criminal Investigation.
on hold due to funding restrictions from the IRS

Teaching Experience

ACCT 402, section 1, Auditing & Assurance Services. 3 credit hours. 17 enrolled.

ACCT 201, section W1, Principles of Financial Acct. 3 credit hours. 9 enrolled.

ACCT 202, section 2, Principles of Managerial Acct. 3 credit hours. 30 enrolled.

ACCT 202, section W1, Principles of Managerial Acct. 3 credit hours. 15 enrolled.

ACCT 201, section D1, Principles of Financial Acct. 3 credit hours. 11 enrolled.

ACCT 202, section E1, Principles of Managerial Acct. 3 credit hours. 23 enrolled.

ACCT 403, section 1, Introduction to Taxation. 3 credit hours. 25 enrolled.

ACCT 201, section W1, Principles of Financial Acct. 3 credit hours. 14 enrolled.

ACCT 202, section 4, Principles of Managerial Acct. 3 credit hours. 27 enrolled.

ACCT 202, section W1, Principles of Managerial Acct. 3 credit hours. 11 enrolled.

ACCT 402, section 1, Auditing & Assurance Services. 3 credit hours. 17 enrolled.

ACCT 201, section W1, Principles of Financial Acct. 3 credit hours. 14 enrolled.

ACCT 202, section 2, Principles of Managerial Acct. 3 credit hours. 28 enrolled.

ACCT 202, section W1, Principles of Managerial Acct. 3 credit hours. 21 enrolled.

ACCT 201, section D1, Principles of Financial Acct. 3 credit hours. 19 enrolled.

ACCT 202, section E1, Principles of Managerial Acct. 3 credit hours. 13 enrolled.

ACCT 403, section 1, Introduction to Taxation. 3 credit hours. 21 enrolled.

ACCT 201, section W1, Principles of Financial Acct. 3 credit hours. 15 enrolled.

ACCT 202, section 4, Principles of Managerial Acct. 3 credit hours. 29 enrolled.

ACCT 202, section W1, Principles of Managerial Acct. 3 credit hours. 18 enrolled.

ACCT 402, section 1, Auditing & Assurance Services. 3 credit hours. 19 enrolled.

LDRS 311, section 1, Jr Ethics Enrichment Experience. 0 credit hours. 21 enrolled.

ACCT 201, section W1, Principles of Financial Acct. 3 credit hours. 14 enrolled.

ACCT 202, section 2, Principles of Managerial Acct. 3 credit hours. 20 enrolled.

ACCT 202, section W1, Principles of Managerial Acct. 3 credit hours. 14 enrolled.

ACCT 201, section D1, Principles of Financial Acct. 3 credit hours. 15 enrolled.

ACCT 202, section E1, Principles of Managerial Acct. 3 credit hours. 14 enrolled.

ACCT 403, section 1, Introduction to Taxation. 3 credit hours. 16 enrolled.

ACCT 202, section 5, Principles of Managerial Acct. 3 credit hours. 15 enrolled.

ACCT 202, section W1, Principles of Managerial Acct. 3 credit hours. 13 enrolled.

ACCT 402, section 1, Auditing & Assurance Services. 3 credit hours. 13 enrolled.

ACCT 201, section W1, Principles of Financial Acct. 3 credit hours. 6 enrolled.

ACCT 201, section W2, Principles of Financial Acct. 3 credit hours. 5 enrolled.

ACCT 202, section 2, Principles of Managerial Acct. 3 credit hours. 15 enrolled.

ACCT 201, section D1, Principles of Financial Acct. 3 credit hours. 14 enrolled.

ACCT 403, section 1, Introduction to Taxation. 3 credit hours. 17 enrolled.

ACCT 202, section 5, Principles of Managerial Acct. 3 credit hours. 18 enrolled.

ACCT 402, section 1, Auditing & Assurance Services. 3 credit hours. 16 enrolled.

ACCT 202, section 1, Principles of Managerial Acct. 3 credit hours. 24 enrolled.

ACCT 202, section 2, Principles of Managerial Acct. 3 credit hours. 14 enrolled.

ACCT 201, section D1, Principles of Financial Acct. 3 credit hours. 14 enrolled.

ACCT 403, section 1, Introduction to Taxation. 3 credit hours. 13 enrolled.

ACCT 403, section S01, Introduction to Taxation. 3 credit hours. 11 enrolled.

ACCT 202, section 2, Principles of Managerial Acct. 3 credit hours. 12 enrolled.

ACCT 402, section 1, Auditing & Assurance Services. 3 credit hours. 20 enrolled.

ACCT 202, section 2, Principles of Managerial Acct. 3 credit hours. 35 enrolled.

BADM 211, section W3, Intro Fin Accounting/Reporting. 3 credit hours. 25 enrolled.

BADM 419, section 1, Federal Taxation. 17 enrolled.

BADM 211, section 2, Intro Fin Accounting/Reporting. 31 enrolled.

BADM 211, section 3, Intro Fin Accounting/Reporting. 35 enrolled.

BADM 703, section 81, MBA Essentials II. 14 enrolled.

BADM 416, section 1, Auditing & Assurance Services. 3 credit hours. 14 enrolled.

BADM 212, section 3, Intro to Managerial Account. 3 credit hours. 34 enrolled.

BADM 212, section 4, Intro to Managerial Account. 3 credit hours. 30 enrolled.

BADM 211, section W1, Intro Fin Accounting/Reporting. 3 credit hours. 17 enrolled.

BADM 211, section W2, Intro Fin Accounting/Reporting. 3 credit hours. 10 enrolled.

BADM 419, section 1, Federal Taxation. 3 credit hours. 13 enrolled.

BADM 211, section 7, Intro Fin Accounting/Reporting. 3 credit hours. 30 enrolled.

BADM 211, section 8, Intro Fin Accounting/Reporting. 3 credit hours. 30 enrolled.

BADM 212, section 1, Intro to Managerial Account. 3 credit hours. 32 enrolled.

BADM 416, section 01, Auditing & Assurance Services. 3 credit hours. 16 enrolled.

BADM 211, section 03, Intro Fin Accounting/Reporting. 3 credit hours. 19 enrolled.

BADM 211, section 05, Intro Fin Accounting/Reporting. 3 credit hours. 35 enrolled.

BADM 211, section W1, Intro Fin Accounting/Reporting. 3 credit hours. 15 enrolled.

BADM 212, section D1, Intro to Managerial Account. 3 credit hours. 16 enrolled.

BADM 419, section 01, Federal Taxation. 3 credit hours. 23 enrolled.

BADM 211, section 03, Intro Fin Accounting/Reporting. 3 credit hours. 33 enrolled.

BADM 212, section 03, Intro to Managerial Account. 3 credit hours. 34 enrolled.

BADM 212, section 05, Intro to Managerial Account. 3 credit hours. 25 enrolled.

BADM 416, section 01, Auditing & Assurance Services. 3 credit hours. 21 enrolled.

BADM 211, section 03, Intro Fin Accounting/Reporting. 3 credit hours. 34 enrolled.

BADM 211, section 04, Intro Fin Accounting/Reporting. 3 credit hours. 31 enrolled.

BADM 211, section 05, Intro Fin Accounting/Reporting. 3 credit hours. 33 enrolled.

BADM 101, section 7, Introduction to Business. 3 credit hours. 17 enrolled.

BADM 211, section W1, Intro Fin Accounting/Reporting. 3 credit hours. 15 enrolled.

BADM 212, section D1, Intro to Managerial Account. 3 credit hours. 22 enrolled.

BADM 419, section 01, Federal Taxation. 3 credit hours. 24 enrolled.

BADM 212, section 04, Intro to Managerial Account. 3 credit hours. 37 enrolled.

BADM 212, section 05, Intro to Managerial Account. 3 credit hours. 33 enrolled.

BADM 416, section 01, Auditing & Assurance Services. 3 credit hours. 24 enrolled.

BADM 211, section 04, Intro Fin Accounting/Reporting. 3 credit hours. 33 enrolled.

BADM 211, section 06, Intro Fin Accounting/Reporting. 3 credit hours. 14 enrolled.

BADM 212, section D1, Intro to Managerial Account. 3 credit hours. 20 enrolled.

BADM 419, section 01, Federal Taxation. 3 credit hours. 24 enrolled.

BADM 212, section 04, Intro to Managerial Account. 3 credit hours. 35 enrolled.

BADM 212, section 05, Intro to Managerial Account. 3 credit hours. 30 enrolled.

BADM 416, section 01, Auditing & Assurance Services. 3 credit hours. 23 enrolled.

BADM 211, section 04, Intro Fin Accounting/Reporting. 3 credit hours. 28 enrolled.

BADM 211, section 06, Intro Fin Accounting/Reporting. 3 credit hours. 12 enrolled.

BADM 212, section 51, Intro to Managerial Account. 3 credit hours. 8 enrolled.

BADM 419, section 01, Federal Taxation. 3 credit hours. 24 enrolled.

BADM 212, section 04, Intro to Managerial Account. 3 credit hours. 31 enrolled.

BADM 212, section 05, Intro to Managerial Account. 3 credit hours. 16 enrolled.

BADM 416, section 01, Auditing & Assurance Services. 3 credit hours. 21 enrolled.
BADM 211, section 03, Intro Fin Accounting/Reporting. 3 credit hours. 39 enrolled.
BADM 211, section 04, Intro to Fin. Accting/Reprting. 3 credit hours. 35 enrolled.
BADM 212, section 51, Intro to Managerial Account. 3 credit hours. 12 enrolled.
BADM 419, section 01, Federal Taxation. 3 credit hours. 24 enrolled.
BADM 212, section 02, Intro. to Managerial Acct. 3 credit hours. 34 enrolled.
BADM 212, section 03, Intro. to Mangerial Acct. 3 credit hours. 27 enrolled.
BADM 416, section 01, Auditing & Assurance Services. 3 credit hours. 19 enrolled.
BADM 211, section 03, Intro to Fin. Accting/Reprting. 3 credit hours. 37 enrolled.
BADM 211, section 04, Intro to Fin. Accting/Reprting. 3 credit hours. 36 enrolled.
BADM 211, section 41, Intro Fin Accounting/Reporting. 3 credit hours. 7 enrolled.
BADM 419, section 01, Federal Taxation. 3 credit hours. 17 enrolled.
BADM 212, section 02, Intro. to Managerial Acct. 3 credit hours. 30 enrolled.
BADM 212, section 03, Intro. to Mangerial Acct. 3 credit hours. 33 enrolled.
BADM 416, section 01, Auditing & Assurance Services. 3 credit hours. 16 enrolled.
BADM 211, section 03, Intro to Fin. Accting/Reprting. 3 credit hours. 31 enrolled.
BADM 211, section 04, Intro to Fin. Accting/Reprting. 3 credit hours. 39 enrolled.
BADM 751, section 81, Individual Taxation. 3 credit hours. 4 enrolled.
BADM 211, section 41, Intro Fin Accounting/Reporting. 3 credit hours. 7 enrolled.
BADM 419, section 01, Federal Taxation. 3 credit hours. 22 enrolled.
BADM 212, section 03, Intro. to Mangerial Acct. 3 credit hours. 30 enrolled.
BADM 212, section 04, Intro. to Mangerial Acct. 3 credit hours. 16 enrolled.
BADM 416, section 01, Auditing & Assurance Services. 3 credit hours. 18 enrolled.
BADM 211, section 03, Intro to Fin. Accting/Reprting. 3 credit hours. 40 enrolled.
BADM 211, section 04, Intro to Fin. Accting/Reprting. 3 credit hours. 39 enrolled.
BADM 211, section 41, Intro Fin Accounting/Reporting. 3 credit hours. 15 enrolled.
BADM 419, section 01, Federal Taxation. 3 credit hours. 22 enrolled.
BADM 212, section 01, Intro. to Managerial Acct. 3 credit hours. 29 enrolled.
BADM 212, section 02, Intro. to Managerial Acct. 3 credit hours. 14 enrolled.
BADM 416, section 01, Auditing & Assurance Services. 3 credit hours. 24 enrolled.
BADM 211, section 03, Intro to Fin. Accting/Reprting. 3 credit hours. 26 enrolled.
BADM 211, section 04, Intro to Fin. Accting/Reprting. 3 credit hours. 38 enrolled.
BADM 211, section 81, Acctg-Fin. 3 credit hours. 12 enrolled.
BADM 212, section 3, Acctg - Dec. 3 credit hours. 33 enrolled.
BADM 212, section 4, Acctg - Dec. 3 credit hours. 33 enrolled.
BADM 419, section 1, Tax. 3 credit hours. 19 enrolled.

Directed Student Learning

Directed Individual/Independent Study, "Professional Accounting Communication." (August 2016 - December 2016).

Advised: Austin Nuttall

Mentoring

Accounting Majors (Undergraduate). Approx. 40 hours. January 2021 - December 2023.

Citadel Freshmen females (Undergraduate). Approx. 20 hours. January 2023 - September 2023.

Non-Credit Instruction Taught

Certification, The Krause Leadership Center - LDRS 311, 20 participants. (October 22, 2025).

Certification, The Krause Leadership Center LDRS 311, 25 participants. (2012 - 2019).

Seminar, Krause Leadership Center, 49 participants. (2014 - May 2017).

Community Outreach, Communities in Schools. (August 2013 - December 2015).

High School Seminar, Communities in Schools. (September 2013 - June 2014).

Teaching Innovation and Curriculum Development

Curricular Development. ACCT402/403. 2024 - Present.

Discussion posts are now video-upload optional. Each discussion receives personalized instructor comments.

Revise Existing Course. All Accounting Courses. January 2024 - Present.

Assessment resubmission provided. Requires re-grading but ensures student learning and a grade increase. Time-consuming but crucial to enhance student engagement.

Revise Existing Course. Federal Taxation. January 2023 - Present.

Integrated a Tableau Assignment to align our courses with requirements from the profession ensuring we include data analytics in all of our courses. The project requires students to prepare a tax return, fill in key information into Excel (5 year summary) and analyze the work using tableau including a variety of techniques (slicers, charts, graphs, etc.)

Revise Existing Course. ACCT202. January 2022 - Present.

Based on student feedback from my annual evaluation, my revised approach is working well. This includes chapter discussions provide written communication methods to require students to apply concepts. Each student is provided with extensive individualized responses.

Homework, all created in Canvas to adhere to the no-publisher work requirement, are unique to each chapter (self-created & including Excel projects, research and quantitative analysis as pertains to the chapter content), in-class online quizzes, both graded and ungraded, require students to practice quantitative and conceptual knowledge.

One-on-One Outreach to Accounting Seniors. Accounting Seniors ACCT403. August 2024 - 2027.

Each student was personally contacted to discuss their goals upon graduation, including one-on-one conversations, connections with the alumni community, resume reviews and general graduation advise.

Revise Existing Course. Auditing - Using AI. August 2025 - December 2025.

In Auditing, students wrote a paper on a PCAOB standard using the approach that was developed and published in an article I wrote last summer. Additionally, one day their case study was to use AI to help develop an auditing program to identify internal control deficiencies.

ACCT201 and ACCT202. January 2025 - December 2025.

Significant efforts were made to ensure online students were successful. I support my online ACCT 201 students through consistent one-on-one outreach, gathering their phone numbers at the start of the term so I can call or text in emergencies or when engagement drops, and offering frequent Zoom review sessions to reinforce challenging material. I redesigned course discussions so that all classes now use

short student-created video posts instead of written responses, building ensuring students learn their topic clearly through teaching other students. Each student is given their own assignment. I also require an individualized Excel assignment each time I teach ACCT 201, guiding students through preparing financial statements with secure, AI-resistant design using Respondus LockDown Browser to ensure the work submitted is genuinely their own.

Curricular Development. Tax. January 2025 - December 2025.

Tableau project requiring step-by-step instructions and video as student skills show a need for stronger guidance.

In-class and video guidance for tax research and tax preparation.

Revise Existing Course. Accounting Courses, online and F2F. January 2025 - December 2025.

AI has been infused throughout my accounting course curriculum, and I use it to revise and improve my own assessments and to teach students how to apply AI effectively in accounting problem-solving. I use AI to revise and strengthen quiz items, discussion prompts, and assignment scenarios, and students are required to use AI in several activities. In one assignment, students receive a financial statement with specific errors and must use AI to identify the mistakes, generate the right questions, and propose corrections. In another, students use AI to help analyze and record a series of transactions.

Revise Existing Course. ACCT202. January 2025 - December 2025.

No phones policy/ 40+ quiz grades to enhance learning including pairs/solo/groups/teams, AI infused questions to use AI as a tool, worksheets and quizzes to guide learning of budgets, overhead rates, etc.

Curricular Development. ACCT201/ACCT202 Online. November 2024 - 2025.

New approach for exams where students upload handwritten notes to align with research showing an increase in learning paraphrasing content and doing so in handwriting.

Curricular Development. Auditing & Cybercrimes. November 2024 - December 2025.

Collaborating with Dr. Griffin, Intelligence Dept, to team teach class related to internal controls and white collar crimes

Curricular Development. ACCT201/202 Online. 2024 - 2025.

Individualized instruction through Zoom sessions with students before exams and as requested.

Revise Existing Course. Taxation. January 2025 - April 2025.

Revised Principles of Taxation course with new text, new homework assignments, and new approach.

Revise Existing Course. ACCT201/202. January 2024 - December 2024.

Resubmits allowed for students on projects (research, papers, etc) to ensure learning.

Personal videos on How to allocate overhead

Group discussions online•

Upload their notes to use on exams to allow less memorization and more application

Refresh my OL class – recertified

Created group discussions with several posts required

OL Allowed students to retake exams/average them, to ensure understanding

OL started tracking views of videos and embedded quizzes to ensure views.

Passed Quality Matters review for ACCT201.Zoom with class before exam

Individual Zoom with students as requested (1-2 each of 6 OL courses taught)

requirement that students load "handwritten" notes for each exam. For example, exam 2 included 4 chapters, and they were to load 3 pages of notes (minimum) and could use these on the exam. The thought process was that all F2F ACCT201/202 classes are allowing notes on exams now; however, online, you can't control student use of notes versus book/phone/etc. Research suggests that handwritten notes enhance retention., which is one of our goals.

New Course. CTP ACCT202 Online. January 2023 - 2024.

New course development for 2023 including over 30 individualized videos, instructor-prepared assignments (revised each session) individually created exams and interactive assignments.

Curricular Development. ACCT403 Auditing and Assurance Services. August 2023 - December 2023.

New Assignment requiring the use of AI as follows:

Paper in Auditing, Artificial Intelligence in Auditing. AI is increasingly used in financial statement audits to detect patterns/outliers, extract and analyze data, detect fraud, predict trends, monitor for compliance, analyze risk, automated sampling, data extraction. New uses continue to be created and applied. You will study related topics in your AIS course. Select a topic specifically **related to the audits of financial statements**. See what you find in your research, or with another firm you're interested in. Or in the military, if you're contracting. You need to include at least THREE sources (and these can be cited as footnotes, works cited, or embedded in your work.) For example, you might see how Forvis/Dixon Hughes (a regional firm) uses it with vendors in the article below. Then find another source to add to your work. This might be the Journal of Accountancy, the CPA Journal, the WSJ, or another reputable source. (no Wikipedia!)

Revise Existing Course. ACCT402 - Auditing. August 2023 - December 2023.

Developed an assignment using Artificial Intelligence, allowing students to experiment with the use of the tool to research standards, and revise and edit their writing.

New Course. ACCT202 Online. January 2023 - March 2023.

New online course, requiring 30 + new individualized videos to support each module and each individualized assignment. This included all homework instructor -created and manually graded with extensive discussion comments to guide student learning.

New Course. CTP - ACCT201. October 2022 - 2022.

First accounting course offered online to cadets, presenting unique challenges with student's not familiar with the online format. Work included carefully graded discussion, requiring a revise and resubmit for poor work, individually developed homework in excel, videos to kick-start homework (at a student's request these are customized to the course). Student responses remain overwhelmingly positive with an intense amount of individualized feedback and instructor-prepared resources.

Revise Existing Course. Auditing. August 2021 - December 2021.

Integration of Data Analytics project using Pivot Tables to analyze outliers in a fixed asset spreadsheet, including instructions and videos to assist.

Revise Existing Course. Auditing. August 2020 - 2021.

Due to the Hybrid Method of instruction, teamwork projects were remodeled to include students online through breakout rooms. Other revisions included extensive use of Canvas, with weekly chapter outlines loaded for grading and use on exams (with 20 chapters covered), two short projects to include PCAOB Standards, and ADA (Auditing Data Analytics) where students researched the use of data in practice. Project two was a Pecha Kucha (6 minute narrated Ppt created through Zoom), loaded online for student comment and peer review. Here students could create their own topic, with many choosing data topics, or specifics from their internship such as internal controls.

Revise Existing Course. Federal Taxation. January 2021 - April 2021.

Due to Hybrid Class format, revisions were required in all aspects of the course, including in-class research (done in the Bastin Financial Services Lab), tax compliance, and overall instructions. Weekly videos were necessary to supplement in-class instructions due to the lack of one-on-one time in class to assist those having challenges with content. Additionally, the online format caused many issues with tax software including the difficulties with software loaded on student computers when they were scheduled for Zoom on the day of the exam. As a result, many classes were spread out over 3 classrooms to enable instructor assistance. Documentation is found on Canvas in the spring 2021 class file.

Revise Existing Course. Taxation. March 13, 2020 - April 28, 2020.

Due to Covid and the new online format, Taxation was taught for the first time online. The new tax laws required original content including 2-3 videos weekly, tutorials, live Zoom sessions, and additional one-on-one attention to assist student learning. Exams, typically taken F2F, had to be specially formatted to work online. Assignments, particularly research and tax preparation, required a revision from the traditional classroom model.

BADM212. September 2019.

BADM212 class contained a much stronger quantitative focus, which required a new approach to instruction. A new software called "gosoapbox", essentially a student response system, was used in

class to allow clicker-type MC questions plus open ended student comments. In addition to Doceri videos to assist with content, Remind Apps (for texting students in a group) and numerous new group projects for this course were used to actively engage students.

Financial Accounting. January 2019.

The accounting program made the decision to change intro accounting classes to a non-debit /credit approach. Evaluation of over 7 texts resulted in a final selection, requiring a new approach with revamped course content and coordination of all instructors. As lead instructor, I selected the new text, developed a syllabus, selected assignments and wrote an online annual report project. My syllabus and online course were used by adjuncts. Throughout the semester we communicated about challenges and successes, to ensure strong student learning.

Taxation. January 2019.

With the Tax Cuts & Jobs Act of 2017, effective for returns filed for the 2018 tax year, the new tax law disrupted everything taught in an introductory tax class. With deductions "suspended" and new laws introduced in virtually every area associated with a personal return, the text barely covered the content needed for students to understand compliance, research and tax planning. As a result personal research on temporary and permanent changes was required for each area discussed, as the law was literally changing as we taught the course. Videos were made to aid student understanding with research and compliance. Research assignments had to be drastically overhauled for the new content.

Auditing & Assurance Services. September 2017.

Classroom instruction included 4 guest speakers, individualized written paper on auditing topics with an extensive review and required revise and resubmit to ensure enhanced writing skills, narrated projects (Pecha Kuchas) posted online for collaborative review, and coverage of 20 chapters. Several students felt strong enough in the course to sit for the CPA exam in the spring. Weekly group projects enhanced student interaction and teamwork.

Financial & Managerial Accounting. September 2017.

Each chapter contained one or more worksheets distributed to each student. Students worked solo, and as they completed their work, I individually checked each one for accuracy. Those struggling were teamed with students who were successful.

Each course had 30 or more quizzes, either face to face or online, containing from 2 to 10 questions. These provided a basis for student knowledge to build on in class. Some quizzes were announced and open notes, others unannounced and without resources. Team quizzes were very successful and popular as students learned from one another.

Use of the smartboard allowed "fill in the blank" problems that students would solve either on the board or on their paper.

Test reviews were prepared by video and disseminated to all students for convenience. Questions generated after reviewing the test review were individually answered.

Financial Accounting OL. May 2017.

This online course, previously taught by a different instructor, included personally narrated PowerPoints (3 per chapter), embedded quizzes in videos, video introductions by students and instructor, online homework, three online quizzes per chapter, a review of live annual reports by video (to ensure students connected the big picture of corporate accounting) and rapid response times to student questions. Positive as well as constructive feedback was used to change the course as it progressed.

Taxation. January 2017.

Tax class, taught in the Bastin Lab, included extensive research in tax law, including the IRC, Treasury Regulations and judicial decisions, to ensure students has a strong understanding of legal tax research. Two written research projects were required, with resubmits necessary until a high level of competence was achieved. Some resubmitted up to four times to ensure competence in using the research tools. Given the high rate of graduate school attendance, some in tax, the students were required to dig more deeply into tax law. Feedback from current students in graduate school indicates they were well prepared for their tax research at Clemson.

The Citadel in DC/NYC. May 2016.

This interdisciplinary course required a coordination between political science, art, and business. Dr. Buchanan & Professor Silverman and I created this course to include opportunities for students to understand the multi-disciplinary world in which we live. Located in Washington DC, with a week of business experience in NYC, the students studied these three areas from the perspective of the monuments within the city. The business perspective was taught one-on-one as well as through group sessions. Enhancements included oral presentations on site, perspective papers, and a Pecha Kucha final paper to provide visual and audio to a PowerPoint presentation summarizing the nine-week experience. Students and faculty visited Wall Street, the American Museum of Finance, and USMA (ethics and character development). Alumni from NYC and surrounding areas met for an event on Wall Street where networking opportunities and collaboration with graduates enhanced the learning experience.

Taxation. January 2016.

Taxation was taught in the Bastin Lab, allowing each student a dual monitored computer. ProSystem FX, a highly rated tax preparation software (CCH) was loaded on the computers where students were able to learn how to prepare returns from a preparer and user perspective. Tax research, using CCH's Intelliconnect, allowed live analysis of tax law during class. Exams included tax preparation and tax research tools.

Auditing. September 2015.

In class, team-based mini case studies related to course content were prepared and reported back to the entire class. Team leaders were rotated (approximately 2 per month)

Written projects on new PCAOB pronouncements with re submissions required until written skills appeared enhanced

Contacted prior students who had received an A in the course and shared their advice with current students on the importance of the class and how to study.

Guest speakers:

- Ernst & Young
- Matt Frish (2015 graduate, employed by EY Chicago)
- Bill Stevens, Deloitte (retired)
- Tim Lauer (JMU Dean of Accounting)
- EY Graduates (career advising)

BADM 211 Financial Accounting. September 2015.

Re-vamped class as follows:

- Pework Quizzes were required before classroom discussion providing an overview of the chapter content. Pework was assigned the night before classroom coverage began
 - Pework quizzes were administered in class in small groups, with students re-submitting the same quiz to enhance retention
 - A total of 45 quizzes over the semester enriched student understanding, discussion, and ultimately classroom performance with a resulting higher performance by students on exams as compared to recent years
 - Implemented the first online homework for BADM 211
- Remind texting application was used to assist students with reminders for course due-dates and work, as well as important emails. Participation was optional but 100% opted in.

BADM 212 Managerial Accounting. May 2015.

- Blended course format meeting twice weekly face-to-face and online twice weekly
- Narrated PowerPoints provided on YouTube (personal narration to slides that were originally created and not provided by the textbook publisher)
- Videos, pen casts, YouTube presentations, and online homework for each chapter
- Doceri videos prepared for difficult content (using special software linking the iPad to PC and recording my voice & pen strokes while using documents [such as homework assignments] displayed on my PC monitor)

- Individual meetings with students to assess their progress
- Remind texting app used to assist students with reminders for course due-dates and work, as well as important emails.

Taxation. January 2015.

- Tax software (CCH Intelliconnect) used for all tax research projects
- Tax research papers assigned with individually selected topics related to areas particular to the specific student
 - o Resubmissions were required until students demonstrated enhanced research and writing skills
 - o Students were referred to the Academic Support Center if writing skills appeared below college level
 - o Student use of Intelliconnect tax research software to find three primary sources to support a specific tax position
- The “Remind” texting application was used to assist students with reminders for course due-dates announcements, and as a referral to important emails.
- Classroom celebrated a “pizza night” at my home
- Sorted and selected appropriate videos from Kahn Academy and other sources to assist students in understanding taxation
- Classroom demonstration of ProSystem FX tax software

Auditing. September 2014.

Guest speakers:

- Bill Stevens, retired Deloitte partner (risk assessment of John Deere)
- Chris Quick, FBI (forensics and fraud)
- Gary Malloy, Citadel Internal Auditor (the Citadel's financials)
- Christa Davis, CPA (accounting careers)
- Ken Lott, Santee Cooper (internal audit process)

Three mini-projects assigned, customized for student interest in individualized topics. These short papers were graded with strict written communication standards to enhance student business writing.

Frequent team case studies used based on chapter content in a format of alternating teams and team leaders weekly.

Class discussions conducted on Facebook

Oral presentations of chapter content to provide students with experience with presenting complex materials.

Financial Accounting. September 2014.

Videos prepared (through Doceri software using an iPad and laptop) providing students with audio and video of course material, instruction and one-on-one assistance where needed.

Integration of fraud cases in class to teach transaction analysis, done concurrently through an academic research project measuring enhanced student performance when transactions are taught through classroom case studies.

Use of Remind 101, a texting software that allows the instructor to text students (who have voluntarily signed up for the service) as a reminder of due dates. All texts are duplicated by email.

Over 20 quizzes were administered, both on CitLearn and in class, to give students frequent assessment measures. Quiz variety included open notes, open book, group quizzes, quiz grades for student submission of classroom notes and vocabulary lists (to encourage note-taking), and standard true/false quizzes.

Continued use of PenCasts as a supplement to instruction for student use to review and learn material.

Coordinated with the Academic Support Center to assist accounting tutors.

2-point XC (extra credit) provided as an incentive for student class participation. Students who answer a difficult question, or ask a question showing their deeper understanding of the topic are awarded 2

points on a recent quiz grade. The incentive is very popular

Presentation of material on depreciation done through student calculations of the allocation of their uniform costs to determine cost per hour use. Students connect to the material in a unique manner.

Review sessions provided after class to help students before exams.

Managerial Accounting - Summer II. May 2014.

First blended course in BADM 212. Class was conducted with two days in class and two days online. Tests were administered face to face.

Extensive work with the Citadel BlackBoard expert, Sara Dierk, to ensure Instructional Design and utilization of CitLearn where appropriate for a blended course.

Online homework through CengageNOW was used, including personal instructor and student instruction by the Cengage representative.

Quizzes online and live were administered for each chapter, for a total of over 20 quizzes to ensure student feedback in a timely manner.

A variety of instructional strategies were used including PenCasts, links to online videos from the textbook author, personally prepared videos, revised PowerPoints for condensed content, and sample exams.

Annual report project with online submission and over 35 comments per project for student feedback.

Extensive work with students who had previously failed this course, and with student athletes who missed several classes.

Remind 101 texting option for students (optional signup) to remind due dates, etc.

Face-to-Face classes included assessment, homework review, discussion of chapters covered online, quizzes, and lecture/discussion format.

Managerial Accounting. January 2014.

Classroom learning enhancements include new & revised PenCasts, the use of the Smart Board for student interaction (student use of Smart Board to answer questions), numerous quizzes, and, for students who are absent or who need additional assistance, video links that teach course content.

Remind 101 - texting feature with optional sign up by students to communicate upcoming due dates or new assignments posted on CitLearn or email.

Annual Report Project modified to include embedded Excel spreadsheets with an online submission format. Over 30 comments were provided for each submission to provide students with detailed feedback on their written papers and analysis.

Class time provided specifically for working on the ARP, with one-on-one instructor assistance, which continued after class and during supplemental (optional) afternoon sessions.

Use of Boeing's 2013 annual report for classroom instruction, with a hard copy available for each student, including individual student preparation of financial statement analysis, and familiarity with an annual report before the actual graded project.

Taxation. January 2014.

Continued use of Intelliconnect for tax research including classroom instruction and demonstration of the research tool, and two research project submissions by students using the research tool. Most students are required to submit several times to ensure they understand the research process for skill improvement. Intelliconnect is used by most major firms..

Step-by-step instructions provided electronically for tax research to show students each search request

and location for completion of their research projects, a previously challenging area for intro tax students.

Classroom demonstration of ProSystem FX, tax software with continued requests to provide this in the computer lab. Tax return preparation is done manually in class, on homework and on exams.

Coarse focus on research, compliance and planning as well as personal financial planning.

Analysis of tax laws as they are proposed in Congress to see the effect it would have on current taxable income of a taxpayer.

Inclusion of tax ethics and Circular 230 through discussions of tax evasion and tax preparer sanctions.

Case study required on a tax professional preparing the return for an individual taxpayer including decisions for research, compliance, and ethics.

Faculty Development Activities Attended

Conference Attendance, "SC Association of Accounting Educators," SCAAE, Charleston, SC. (February 20, 2026 - February 21, 2026).

Continuing Education Program, "CPA Continuing Education," AAA and AICPA. (January 2025 - December 2025).

Conference Attendance, "American Accounting Association Annual Meeting," AAA, Chicago, IL. (August 2025).

Seminar, "Conversations with Dr. Vlasta Zekulic," CW-ERG. (March 2025).

Workshop, "Leadership and Growth," Junior League of Charleston, Charleston. (January 2025).

Seminar, "Leadership for the Future," Junior League of Charleston. (January 25, 2025).

Seminar, "Building Bridges: Tailored Strategies for Accessibility in the Classroom," Citadel ERG & HR, Charleston. (November 14, 2024 - 2024).

Continuing Education Program, "Case Method Teaching," Harvard Business School, Boston, MA. (March 14, 2024 - March 17, 2024).

Workshop, "Women in Leadership at the Federal Reserve Board," Citadel Women's ERG. (September 9, 2023 - November 9, 2023).

Workshop, "Effective Meeting Management," Citadel HR and Citadel Women's ERG. (October 24, 2023).

Conference Attendance, "AAA Teaching & Learning/DEI conference," American Accounting Association, Washington, DC. (October 20, 2023 - October 22, 2023).

Seminar, "Women in Leadership," Executive Leadership Academy, The Citadel, Charleston, SC. (July 26, 2023 - August 10, 2023).

Conference Attendance, "SC Women in Higher Education," The Citadel, Conway. (February 2, 2023 - February 3, 2023).

Conference Attendance, "Teaching Learning & Curriculum Mid-Year Conference," American Accounting Association, San Antonio, TX. (November 6, 2021 - November 8, 2021).

Seminar, "Numerous Online Learning Programs," The Citadel and the American Accounting Association. (March 2020 - December 2020).

Conference Attendance, "Accounting Educator's Conference," Arkansas Society of CPA's, Zoom. (May 13, 2020).

Continuing Education Program, "Auditing Mid-Year Conference," American Accounting Association, Houston, TX. (January 16, 2020 - January 19, 2020).

Conference Attendance, "American Accounting Association Annual Meeting," AAA, San Francisco, CA, United States. (August 11, 2019 - August 14, 2019).

Conference Attendance, "Louisiana Society of Accounting Educators," Louisiana CPA Association, Baton Rouge, LA. (April 5, 2019).

Continuing Education Program, "Tax Cuts and Jobs Act," SC Association of CPAs. (January 8, 2019).

Conference Attendance, "Teaching Learning & Curriculum MidYear Meeting," Dallas, TX. (November 8, 2018 - November 10, 2018).

Conference Attendance, "Conference on Teaching & Learning Accounting," American Accounting Association, Washington DC. (August 10, 2018 - August 11, 2018).

Conference Attendance, "Annual Meeting AAA," American Accounting Association, San Diego, CA. (August 7, 2017 - August 9, 2017).

Conference Attendance, "CTLA," American Accounting Association, San Diego, CA. (August 5, 2017 - August 6, 2017).

Conference Attendance, "South Carolina Conference on Innovations in Teaching and Learning in Higher Education," MUSC, Charleston, SC, United States. (July 14, 2017).

Conference Attendance, "MidWest Regional Meeting," American Accounting Association, St. Louis, MO. (October 15, 2015 - October 18, 2015).

Conference Attendance, "American Accounting Association Annual Meeting," Chicago, IL. (August 6, 2015 - August 11, 2015).

Conference Attendance, "Southeastern American Accounting Association Meeting," American Accounting Association, Asheville, NC. (April 2015).

Conference Attendance, "MidYear Auditing Conference," American Accounting Association, Miami, FL. (January 2015).

Webinar, "Using PechaKecha in the classroom & online," American Accounting Association TLC. (January 6, 2015).

Conference Attendance, "American Accounting Association Annual Meeting," Atlanta, GA. (August 2014).

Conference Attendance, "Conference on Teaching & Learning Accounting," American Accounting Association, Atlanta, GA. (August 7, 2014 - August 8, 2014).

Conference Attendance, "Southeastern American Accounting Association meeting," American Accounting Association, St. Petersburg, FL. (April 2014).

Webinar, "Technology in the Classroom," American Accounting Association. (January 2014).

Conference Attendance, "American Accounting Association Annual Meeting," AAA, Anaheim, CA. (August 3, 2013 - August 5, 2013).

Conference Attendance, "Southeastern American Accounting Association meeting," American Accounting Association, Nashville, TN. (April 2013).

Conference Attendance, "Southeastern American Accounting Association meeting," American Accounting Association, Savannah, GA. (April 2012).

University Service

Accounting Curriculum, ACFI Dept. (January 2024 - Present).

Accounting Program Retention: ACFI Dept, Ad-hoc. (2024 - Present).

Founder - Citadel Employee Resource Group, The Citadel Women's Employee Resource Group. (March 2023 - Present).

Faculty Development Series, CW-ERG. (March 2022 - Present).

Speaker Series, CW-ERG. (March 2022 - Present).

Committee Member - Tenure & Promotion/FTPC revisions, Accounting & Finance Committee. (2022 - Present).

Veteran Financial Literacy, Veterans Center. (2020 - Present).

LDRS311 Instructor- Annually, Krause Center for Leadership. (October 2014 - Present).

Co-Advisor to Beta Alpha Psi, Beta Alpha Psi - ACFI Department. (January 2024 - December 2028).

Committee Member, Search Committee ACFI. (August 2025 - November 2025).

Mentor, ACFI. (January 2025 - November 2025).

Freshmen Female Cadet Semi-Annual Gathering - Organizer, Citadel WERG. (October 2022 - September 2025).

Interview/Recruitment of Accounting Faculty at AAA, ACFI. (August 2025).

Representative, Sabbatical Committee. (July 2022 - July 2025).

Chair, Faculty Standards Committee, BSB. (August 2022 - June 2025).

Committee Member, Faculty Senate - Ad hoc Service Standards Committee. (September 2024 - April 2025).

Mentor - Co-instructor, ACFI. (August 2024 - December 2024).

ACFI Department. (April 2024 - December 2024).

Mentor, ACFI. (January 2024 - December 2024).

Adjunct Evaluation/Mentor, ACFI Dept. (September 2024 - November 2024).

Panelist, AI's Impact on Learning: A Balanced Discussion- A Panel Discussion Moderated by Dr. Selden.
(November 8, 2023 - November 8, 2024).

Substitute, ACFI Dept. (September 2024).

Representative - Faculty Tenure & Promotion, FTPC. (August 2022 - June 2024).

Faculty Fellow, CEITL-DE. (August 2023 - May 2024).

Moderator, Citadel 25th Anniversary of Women Cadet Graduates, Provost's Office. (March 2024).

Presentation/Panelist, The Citadel WiCyS Chapter (Women in Cyber). (March 25, 2024).

Provost-Appointed Committee Member, Citadel 25th Anniversary of Women. (January 2023 - March 15, 2024).

Panelist, Using AI in the College Classroom Presented to The Citadel Foundation, The Citadel Provost's office.
(February 15, 2024 - February 16, 2024).

Committee Member, SOCON Professor of the Year. (November 2023 - December 2023).

Guest Speaker, BANA101. (January 2023 - December 2023).

Chair, Faculty Standards Committee. (August 2022 - December 31, 2023).

Instructor/Moderator, Krause Leadership. (October 16, 2023 - October 31, 2023).

Faculty Senator, Faculty Senate. (January 2021 - July 2023).

Guidance, Citadel Athletic Department. (January 11, 2023).

External Committee Member, Promotion. (October 2022 - December 2022).

Committee Member, Search - Career Services Director. (September 2022 - December 2022).

Committee member, Search Committee- External Member - Organizational Behavior for Management Dept.
(September 2022 - December 2022).

Committee Member, Search Committee, HR position. (October 2022 - November 2022).

Committee Member, Strategic Planning. (January 2021 - June 30, 2022).

Committee Chair, Student Affairs Committee. (August 2019 - July 2020).

Committee Member, Scholarship Committee. (February 2017 - July 1, 2020).

Director/Coordinator, Business Scholars. (April 2017 - June 30, 2020).

Post Tenure Review. (March 2018 - February 2020).

Junior Ethics Experience. (October 2012 - 2019).

Committee Member, Other. (January 2019 - March 2019).

Committee Member, Post-Tenure Review - English Department - Dr. L. Hendrix. (February 2018 - February 2019).

Committee Member, Honor Board of Review. (January 15, 2019 - February 23, 2019).

Committee Member, Core Curriculum/General Education Task Force. (May 2016 - 2018).

Committee Member, Scholarly Activities Committee. (2014 - 2018).

Committee Member, Promotion Committee - English Department - Dr. L. Rule Maxwell. (October 2018).

Faculty Excellence Committee. (January 2017 - December 2017).

Faculty Mentor, Other. (2002 - 2017).

Committee Member, Other. (May 2017 - November 2017).

Committee Member, Search Committee - Career Services Director. (August 2016 - December 2016).

Committee Chair, Faculty Excellence Committee. (January 2016 - December 2016).

Development of Courses: The Citadel In NYC and DC. (September 2015 - 2016).

Committee Chair, Faculty Affairs Committee. (2011 - 2015).

Faculty Mentor, Citadel Women's Leadership Day @ Boeing. (March 2015).

Committee Member, SACS Accreditation Quality Enhancement Program Committee. (2013 - 2014).

Committee Member, Citadel Auditor Selection Committee. (2012 - 2013).

Committee Member, Other. (2010 - 2013).

Committee Member, Committee Across the Curriculum. (2004 - 2011).

Committee Member, Other. (2010).

Committee Member, Other. (2007 - 2010).

Committee Member, Other. (2009).

Committee Chair, Other. (2007).

Committee Member, Curriculum and Instruction Committee. (2004 - 2007).

Other. (2002 - 2005).

Attendee, Meeting, Citadel Faculty and Staff Salary Review Panel. (January 2004 - December 2004).

Committee Chair, Other. (2003 - 2004).

Committee Member, Other. (2002 - 2004).

Organizer, Guest Speaker Listing. (2003).

Other. (2002).

Student Affairs Committee. (2000 - 2001).

Community Relations Committee. (1998 - 2000).

Other. (1996).

Professional Service

- Committee Member, AICPA Academic Executive Committee, Durham, NC. (June 2025 - June 2028).
- Committee Member, AICPA Academic Executive Inclusivity Committee, NC. (June 2025 - June 2028).
- Committee Member, Membership Initiatives Executive Committee, Raleigh. (2025 - 2026).
- Committee Member, SC Board of Accountancy Education Committee, Columbia. (August 2023 - 2025).
- Session Chair, Beta Alpha Psi. (October 2024).
- Committee Member, American Accounting Association Innovation in Accounting Education Award Committee, San Francisco, CA. (August 2018 - August 2020).
- Treasurer, Teaching Learning and Curriculum Section of the AAA. (August 2017 - August 2020).
- Committee Member, AAA Issues in Accounting Education Publication Committee, National. (January 2017 - August 2019).
- Committee Member, Innovations in Accounting Education Award Committee -American Accounting Association I. (August 2013 - August 2019).
- Committee Member, American Accounting Association Innovation in Accounting Education Award Selection Committee. (August 2018 - March 2019).
- Committee Member, AAA Conference on Teaching & Learning Accounting, Washington, DC. (August 2017 - August 2018).
- Task Force Chair, Pathways Commission Task Force - A Joint Effort by the AICPA and the AAA. (August 2013 - August 2018).
- Committee Member, American Accounting Association. (March 2018 - May 2018).
- Chairperson, Conference on Teaching & Learning Accounting, San Diego, CA. (August 2015 - August 2017).
- Secretary, Teaching, Learning & Curriculum Committee Section of the AAA, Tampa, FL. (August 2015 - August 2017).
- Committee Chair, SEAAA Region Planning Committee, Tampa, FL. (2013 - 2016).
- Treasurer, South Carolina Association of Accounting Educators, Charleston, SC. (February 19, 2016 - February 20, 2016).
- Textbook Review. (December 2014 - February 2015).
- Conference-Related, AAA 7th Annual Conference on Teaching and Learning Accounting, Atlanta, GA. (2014).
- Task Force Member, Teaching, Learning & Curriculum Committee, Atlanta, GA. (October 2014 - 2014).
- Steering Committee/Facilitator, AAA 6th Annual Conference on Teaching and Learning Accounting, Anaheim, CA. (August 2013).
- Steering Committee/Facilitator, AAA 5th Annual Conference on Teaching and Learning Accounting, Washington DC. (August 2012).
- Steering Committee/Facilitator, AAA 4th Annual Conference on Teaching and Learning Accounting, Denver, CO. (August 2011).
- Task Force Member, American Accounting Association, Sarasota, FL. (August 2010 - August 2011).
- Reviewer/Referee, Cengage Publishing. (December 2010).
- Steering Committee/Facilitator, AAA 3rd Annual Conference on Teaching and Learning Accounting, San Francisco, CA. (August 2010).
- Teaching Tip Coordinator/Steering Committee, AAA 2nd Annual Conference on Teaching and Learning Accounting, New York City, NY. (August 2009).

Reviewer/Referee, Pearson Education. (July 2009).

Facilitator, AAA 1st Annual Conference on Teaching and Learning Accounting, Anaheim, CA. (August 2008).

Speaker/Facilitator, AAA Continuing Professional Education: Recruiting Professionally Qualified Accounting Faculty, NYC. (April 2008).

Reviewer/Referee, McGraw Hill. (January 2008).

PowerPoint Reviewer, Warren/Reeve. (July 2007).

Reviewer/Referee, Journal of Management Education. (September 2004).

Test Bank Revision, Houghton Mifflin Accounting Text Series. (September 2004).

Reviewer/Referee, Financial Accounting. (April 2004).

VITA Program. (1992 - 2003).

Manuscript Reviewer/Moderator, 2003 Southeast Regional Meeting. (March 2003).

Coordinator, South Carolina Association of CPA's High School Symposium. (2002).

Reviewer/Referee, Annual Report Project. (2001 - 2002).

Reviewer/Referee, Charleston Connections Conference, Charleston, SC. (2001 - 2002).

Moderator/Reviewer, Second Annual Charleston Connections Conference, Charleston, SC. (May 2002).

Reviewer/Referee, Association for Business Communication. (March 2002).

Online Accounting Tutor. (2000 - 2001).

Session Chair, Indiana State University. (June 2001).

Committee Member, SCACPA Accounting Careers and Academic Relations Committee. (2000).

Chairperson, SCACPA Accounting Careers and Academic Relations Committee. (1999).

Chapter Review, Houghton Mifflin. (1999).

Comparative Book Review, Houghton Mifflin. (September 1999).

Presenter, South Carolina Association of Guidance Counselors, Hilton Head, SC. (January 1999).

Chairperson, SCACPA Accounting Careers Committee. (1998).

Presenter, Student Orientation of SCACPA, Columbia, SC. (November 1998).

Moderator, Table Topic: Collaborative Learning, Communication Across the Curriculum. (September 1998).

Facilitator, 14th Annual Conference on Accounting Education, New Orleans, LA. (August 1998).

Planning Committee, South Carolina Association of Accounting Educators, Charleston, SC. (February 1998).

Session Organizer and Moderator, South Carolina Association of Accounting Educators. (February 1998).

Chapter Reviews, Prentice Hall. (1997).

Vice-Chairman, SCACPA Accounting Careers Committee. (1997).

Case Review, Decision Sciences Institute. (1996).

Chapter Reviews, Prentice Hall. (1996).

Committee Member, SCACPA Accounting Careers Committee. (1994 - 1996).

Case Review, Decision Sciences Institute. (1994).

Chapter Reviews, Prentice Hall. (1993).

Public Service

Board of Directors, Junior League, Charleston. (January 2025 - Present).

Board Member, Commission on Women - City of Charleston, Charleston, SC. (August 2024 - Present).

Volunteer, Florence Crittenden home, Charleston. (July 24, 2024 - Present).

Guest Speaker, Burke High School, Charleston, SC. (November 2022 - Present).

Volunteer, Lowcountry Food Bank, East Cooper Warming Shelter, etc, Charleston, SC. (August 1990 - Present).

Committee Member, Women's Leadership Series. Junior League of Charleston, Charleston, SC. (July 1, 2024 - June 30, 2025).

Participant, Kenan Institute of Private Enterprise & UNC Kenan Flagler Business School SC Small Rural Business NCGrowth, Walterboro, SC. (July 27, 2024 - October 2024).

Judge, DECA, Inc., Mt Pleasant, SC. (December 2023).

Judge, Wando High School DECA program - Regional Judge, Mt Pleasant. (November 29, 2023).

Chair, The Citadel Baker School of Business, Charleston, SC. (June 2020 - June 2021).

Participant, Ronald McDonald House, Charleston, SC. (January 24, 2018).

Invited Judge of Middle School Talent Show, Jerry Zucker Middle School. (April 2017).

Committee Member, Junior League of Charleston, Charleston, SC. (January 2015 - December 2015).

Teaching Financial Literacy to Middle & High School Students, Communities in Schools. (January 2015 - December 2015).

Guest Speaker, Sanders Clyde Middle School, Charleston, SC. (May 2015).

Guest Speaker, Financial Literacy Instructor, Charleston County Schools, McClellanville, SC. (2013 - 2014).

Tutor elementary school children in a reading program., Volunteers in Literacy Tutor, Charleston County School District. (2009 - 2014).

Kirk Choir Member: Mt. Pleasant Presbyterian Church. (2006 - 2014).

Endowment Committee: Mt. Pleasant Presbyterian Church. (2009 - 2012).

James B. Edwards PTA School Board. (2010 - 2011).

Volunteer, James Mitchell Elementary Volunteer. (2009 - 2010).

Organizer, Adopt a Classroom at Mitchell Elementary, CCSD. (2008).

Organizer, Santee Cooper Consultant. (2008).

Volunteer Coordinator, Adopt a Classroom. (2004 - 2005).

Sunday School Teacher, Mt. Pleasant Presbyterian Church. (2004).

Chair, The Junior League of Charleston, Inc. (2000 - 2001).

The Junior League of Charleston Membership Council. (2000 - 2001).

The Junior League of Charleston, Inc. (1999 - 2000).

Presenter, Welfare to Work Adult Mentoring Program. (March 2000).

The Junior League of Charleston, Inc. (1998 - 1999).

Presenter, Junior League of Charleston, Inc. (April 1999).

Presenter, Adult Mentoring Program. (March 1999).

Presenter, The Investment Club. (December 1998).

Chair, The Junior League of Charleston, Inc. (1998).

Outstanding Teachers of America. (1998).

The Junior League of Charleston, Inc. (1998).

Outstanding Young Woman of America Award. (1997).