

**Cynthia E. Bolt**  
The Baker School of Business  
Department of Accounting and Finance  
The Citadel  
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## **Appointments**

Department Head, Department of Accounting and Finance 2020- 2022  
Full Professor, The Baker School of Business 2017- current  
Director, Citadel Business Scholars program 2016 - 2020  
Associate Professor, The Citadel School of Business 2003-2016  
Assistant Professor, The Citadel School of Business 1996-2003  
Visiting Professor, The Citadel School of Business 1990-1996  
Adjunct Professor, Midlands Technical College 1987-1988  
Adjunct Professor, Trident Technical College 1985-1987

## **Honors and Awards**

Undergraduate Professor of the Year (day program): Baker School of Business (2020, 2018)

Best Article of the Year: The Tax Adviser (2017) *The Preparer Penalties of Sec. 6694 and Sec. 6695* (with E. Plummer)

Best Paper Award: American Accounting Association - Teaching, Learning and Curriculum, SEAAA (2015). *Majority Shareholder Fraud in a Closely-Held S Corporation: A Case Study*

Best Paper Award: American Accounting Association - Teaching, Learning and Curriculum, SEAAA (2012). *Introductory Financial Accounting: Teaching from a Fraud Perspective*

Best Paper Award: Accounting Horizons (2009) *The Impact of Academic Accounting Research on Professional Practice: An Analysis by the AAA Research Impact Task Force*

South Carolina Educator of the Year Award (2001) Presented by the South Carolina Association of Certified Public Accountants.

## **Education**

Master of Taxation, University of South Carolina, 1989  
Elective Coursework: Principles of College Teaching & Educational Research

BS, University of North Carolina, 1982  
Major: Accounting  
Supporting Areas of Emphasis: Business

## Professional Certification

Certified Public Accountant, South Carolina Certificate #2323

Certified Global Management Accountant

## Teaching Overview

### A. Courses Taught

#### Undergraduate Courses

ACCT402 Auditing and Assurance Services

ACCT403 Taxation

LDRS311Moral Courage (fall 2016, 2017, 2018)

LDRS111Ethics and Leadership/Ethical Dilemmas

ACCT201 Principles of Financial Accounting (course lead 2000-2020)

INTD350 DC Leadership in Action (summer 2016)

ACCT202 (online) Managerial Accounting (course developer)

ACCT201(online) Principles of Managerial Accounting

LDRS311Junior Ethics Experience

BADM325 Principles of Management

#### Graduate Courses

BADM751 Taxation (course developer)

BADM603 Management Accounting

### B. Other Teaching/Student Activities

**Firm Liaison for student recruiting** Ernst and Young, LLP, KPMG, PWC and Deloitte  
Touche Tohmatsu Limited

**The Citadel in NY & DC** Experiential learning experience on-site in NYC

**Independent Study (Honors)** Professional Accounting Communications (course  
developer)

**Independent Study:** Partnership Taxation

## Scholarly and Professional Activities

### Scholarly Journal Publications – peer-reviewed

“Insights for Tax Specialists on Reasonable Compensation, Cash Tax Savings, And Executive Compensation” (with E. Plummer) *The Journal of Taxation* (forthcoming, 2023 )

A Neuroeducation And Cognitive Learning-Based Strategy To Develop Active Learning Pedagogies For Accounting (with L. Marshall). *The Accounting Educators' Journal* (forthcoming, 2023)

“Developments in Research-Based Instructional Strategies: Learning-Centered Approaches for Accounting Education” *Journal of Business Education and Scholarship of Teaching*. 15(2): 1-14 (2021) .

“Fraud Mini-Cases: An Active Learning Pedagogy to Enhance Student Competencies in Financial Accounting Principles” (with L. Marshall) *Global Perspectives on Accounting Education*. 13(1): 51-79 (2016)

“The Effect of a Taxpayer Advocate Order on Tolling the Taxpayer Statute Of Limitations” (with V. Chambers and B. Elzweig) *Oklahoma City University Law Review*. Vol. 41, Issue 3 (Fall 2016).

“Integrating Fraud in the Introductory Financial Accounting Course” *Accounting Instructors’ Report* [https://wp-content/uploads/2016/12/Fall-2016\\_AIR\\_Bolt-Lee\\_Integrating-Fraud-in-the-Introductory-Accounting-Course.pdf](https://wp-content/uploads/2016/12/Fall-2016_AIR_Bolt-Lee_Integrating-Fraud-in-the-Introductory-Accounting-Course.pdf) (Fall 2016)

“Uncovering Majority Shareholder Fraud in a Closely Held Corporation” (with R. Powell) *Journal of Forensic and Investigative Accounting*. Vol. 8, No. 3, (July-December, 2016).

“The Major Field Test in Business: A Direct Measure of Learning in Common Business Disciplines” (with S. Simmons and W. Jones) *Journal of Business Education*, Vol 90, No. 2, (2015).

“Developments in Accounting Regulation: A Synthesis and Annotated Bibliography of Evidence and Commentary in the 2011 Academic Literature” (with S. Moehrle, J. Reynolds-Moehrle, and T. Williams) *Research in Accounting Regulation*. Vol. 25, No.1: 53-76, (April 2013).

“Ethical Issues in Professional Tax Practice” (with R. Powell) *Journal of the International Academy for Case Studies*. Vol. 17, No. 8: 41-47 (2011).

“The Impact of Academic Accounting Research on Professional Practice: An Analysis by the AAA Research Impact Task Force” (S. Moehrle, R. Stephen R.; K. Anderson, F. Ayres, R. Debreceeny, M. Dugan, C. Hogan, M. Maher, E. Plummer) *Accounting Horizons*, Vol. 23 No. 4: 411-456, (December 2009)

“Changes in the Taxpayer-Tax Prepare Relationship: The Effects of Circular 230” (With J. Moody) *Journal of Legal, Ethical and Regulatory Issues*, Vol. 12, No. 2 (Summer 2009).

“Case Studies for Introductory Tax: Integrating Research and Ethics” *Research on Professional Responsibility and Ethics in Accounting* Vol. 11: 207-225, (Spring 2007).

“Examination Retakes: Knowledge Retention Assessed” (with S. Simmons and S. Foster) *Journal of Student Centered Learning* Vol. 2, No. 3, (Spring 2006).

“The Core Competencies Framework: A New Element in the Continuing Call for Accounting Education Change” (with S. Foster) *Accounting Education: An International Journal* Vol.12, No. 2 (March 2003).

“Showcasing the Skilled Business Graduate: Expanding the Toolkit” (With J. Moody and B. Stewart) *Business Communication Quarterly* Vol. 65, No. 1: 21-36 (March 2002).

“Examination Retakes in Accounting: Increased Learning by Writing after the Exam” (With S. Foster) *Language and Learning across the Discipline* Vol. 4, No.2 (August 2000).

### **Professional Publications–Peer Reviewed (professional and editorial review)**

“Highlights of Tax Research: Some Key Takeaways from Recent Academic Studies” (with Elizabeth Plummer) *The Tax Adviser* Vol. 54, No. 4 (April 2021).

“Highlights of Internal Audit Research” (with S. Showalter and A. Chu) *Journal of Accountancy* (June 2019).

“The Preparer Penalties of Sec. 6694 and Sec. 6695” (with E. Plummer) *The Tax Adviser* (2017).

“Highlights of Managerial Accounting Research” (with M. Swain) *Journal of Accountancy* (December 2016).

“Highlights of Forensic Research” (with S. Kern) *Journal of Accountancy* Vol. 220, No. 5 (November 2015).

“Highlights of Ethics Research” (with Y. Wu, and A. Zimmerman) *Journal of Accountancy* Vol. 215, No. 12 (June 2014).

“Highlights of Tax Research” (With E. Plummer) *Journal of Accountancy*, Vol. 214, No. 1(July 2013).

“Highlights of Auditing Research” (with S. Showalter) *Journal of Accountancy* Vol. 214, No. 1 (July 2012).

“Highlights of Corporate Governance Research” (with S. Moerhle and D. Farber) *Journal of Accountancy* Vol. 212, No. 3 (September 2011).

“Highlights of Finance and Accounting Ethics Research” (with J. Moody) *Journal of Accountancy* Vol. 210, No. 4: 38-41 (October 2010).

“Highlights of IFRS Research” (With L.M. Smith) *Journal of Accountancy* Vol. 208, No. 5: 48-52 (November 2009).

“Highlights of Accounting Systems Research” (With J. Moody) *Journal of Accountancy*, Vol. 206, No. 5: 68-72 (December 2008).

“A Showcase of Tax Research” (with E. Plummer) *Journal of Accountancy* Vol. 206, No. 4: 48-52 (October 2008).

“Management Accounting Research for the C-Suite” *Journal of Accountancy* Vol. 204, No. 5:50-53 (November 2007).

“Mining Auditing Research,” *Journal of Accountancy* Vol. 203, No. 4: 68-70 (April 2007).

“Deductibility of Advanced Business Degrees” *CPA Journal* Vol.75, No.9 pp 50-53 (September 2005).

“New Competencies for Accounting Students” (With S. Foster) *CPA Journal*, Vol. 72, No.1 (January 2002).

“Deduction for Religious Education Disallowed,” *Journal of Accountancy*, Vol. 190, No. 6 (December 2000).

“Determination of a Profit Motive” *Journal of Accountancy* Vol. 190, No. 3 (September 2000)

“Liability for Unpaid Income Tax When Erroneous Advice is Given?”  
*Journal of Accountancy* Vol. 189, No. 4 (April 2000).

“Short-Term Rentals Classified as Passive Activity Losses,” *The Journal of Accountancy* Vol. 189, No 1 (January 2000).

“Making Sense out of the MSA and the MedicarePlus Choice MSA” *The CPA Journal* Vol. 70, No. 1 (January 2000).

“Minor Acts of the Taxpayer Relief Act of 1997,” *The CPA Journal* Vol. 69, No. 1 (January 1999).

"Changes in Tax Law Benefit Adopting Parents" (With S. Foster) *The CPA Journal* Vol. 67, No. 10 (October 1997).

"Tax Changes Reduce Bookkeeping Requirements But Does Business Care?" (With S. Foster) *The CPA Journal* Vol. 67, No. 2 (February 1997).

### **Work In Progress-Scholarly Working Papers**

“Using Theories of Neuroeducation to Teach Introductory Financial Accounting Principles” with L. Marshall. Under revision.

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### **Other Publications- Book Case Studies, Articles in Popular Press and Other**

“Certainty of death and taxes: what the statistics reveal after 230 years” *Charleston Regional Business Journal* (April 2020).

“Case Study- Exclusive Restaurant or a Front for Illegal Gambling?” *CCH: Case Studies on Fraud & Forensics*. Second Edition (August 2016).

“Case Study- Cash Basis Small Businesses: When the IRS Examines for Underreporting” *CCH: Case Studies on Fraud & Forensics*. Second Edition (August 2016).

“New Exclusion Laws for Restitution from Wrongful Incarceration” *The Tax Adviser* (April 2016).

“Knowledge and Organization Reduce the Burdens of April 15<sup>th</sup>” *The Post and Courier Business Report* (March 2002).

“Competencies for Entry-Level Accountants: What the Profession Expects of You,” *The SCACPA CPA Report*, (February/March 2001).

“Inside the Mind of Your Future Boss” (With S. Foster) *New Accountant*, (Winter 2000),

“Organization: The Key to Successful Tax Preparation” *The Post and Courier Business Report*, (March 2000).

“The Information Interview: Career Selection with Insider Information” *The SCACPA CPA Report*, (February 2000).

“Reducing The Paperload: Cumulative Homework Submissions” *Sam Houston State University Across the University Writing Program Newsletter* (July 1999).

“Time and the Accounting Class” *Accounting Instructors’ Report* (Spring 1999).

“Don’t Just Hand Taxes to Preparer” *The Post and Courier Business Report* (March 1999).

“How to Choose the Best Job” *The SCACPA CPA Report* (February 1999).

“Before the Interview” *The SCACPA CPA Report* (February 1998).

"New Tax Law Aids Adopting Parents" (With S. Foster) *Roots and Wings Adoption Magazine* (Fall 1997).

"The Job Interview: When It's Your Turn to Ask Questions" *The SCACPA CPA Report*, (February 1996).

"Internships Around the State" *The SCACPA CPA Report* (March 1995).

### **Proceedings Publications**

“Testing the Profession’s Requisite Competencies: Accounting Education Frameworks and the Proposed Modifications to the CPA Exam” Presented to the Mid-Atlantic AAA Conference, Baltimore, MD (April 2002).

### **Academic Publication --Text Review**

“Book Review: Financial Accounting: A Business Process Approach,” *Issues in Accounting Education* Vol. 17, No. 4 (November 2002).

### **Presentations at Conferences and Professional Meetings**

**Peer Reviewed Presentations: National/International Organizations (Funded by Citadel Foundation Presentation Funds or Citadel Foundation Development Funds)**

Teaching, Learning and Curriculum Mid-Year meeting, "Scaffolding: Building that A-Ha Moment by Connecting Prior Knowledge to New Knowledge" American Accounting Association, Virtual (November, 2020).

Teaching, Learning and Curriculum Mid-Year meeting, "Accounting Education Research: Using the Scholarship of Teaching to Develop a Learned Profession" American Accounting Association, Tampa, FL. (November, 2019).

Teaching, Learning and Curriculum Mid-Year meeting, "Using Concepts from Neuroscience to Teach Introductory Classes" American Accounting Association, Dallas, Tx. (November, 2018).

Conference on Teaching and Learning Accounting, "Using Fraud Cases to Engage Students in Active Learning," American Accounting Association, Washington DC. (August, 2018).

Southeast Region Meeting, "Internal Control Observations: What do Students Notice in the Real World?," American Accounting Association, Greenville, SC. (April, 2018).

Southeast Region Meeting, "Sharing Best Teaching Practices Panel - Classroom Engagement Using Worksheets to Practice Problems," American Accounting Association, Greenville, SC. (April 2018).

American Accounting Association Annual Meeting, "Unique Twists to Quizzes to Enable Student Learning, Retention and Motivation," American Accounting Assoc, San Diego. (August 2017).

CTLA, "Tackling Teaching Together," American Accounting Assoc, San Diego. (August 2017).

Emerging Learning Strategies - Annual Meeting, "Tax Research," American Accounting Assoc, San Diego. (August, 2017).

APLG (Assoc. of Program Leaders in Accounting - Deans/Dept Heads), "Academic Research Initiatives for Professionally Oriented Faculty," American Accounting Assoc, Phoenix, AZ. (February 2017).

Conference on Teaching & Learning Accounting, "Collaborative Teaching Strategies," American Accounting Association, New York City. (August 2016).

"Teaching Auditing Risk" Southeast AAA (Panelist) Atlanta, Ga. (April 2016).

"A Case Study on Majority Shareholder Fraud in a Closely Held Corporation," Midwest AAA, American Accounting Association, St. Louis MO. (October 2015) (best paper recipient).

"Enhancing Student Learning Through Quizzes," Hartley, C. (Panelist), Midwest AAA, American Accounting Association, St. Louis MO. (October 2015).

"Resources for New Faculty-An Introduction to Academic Publishing," Conference on Teaching and Learning Accounting, American Accounting Association, Atlanta Georgia. (August 2014).

"Uncovering Majority Shareholder Fraud in a Family Owned S Corporation" Presented to the 2013 International Conference, Maui, HI (January 2013).

"Introductory Financial Accounting: Teaching from a Fraud Perspective" Presented to the SEAAA, Savannah, Ga. (April 2012).

"Instructional Strategy Forum; Best Practices from the Audience" National Conference on Teaching and Learning Accounting. (best paper recipient). San Francisco, (August 2010).

"Linking Accounting Research, Practice and Higher Education: Student Assignments" Presented to the Western Region AAA. Portland, Oregon, (April 2010).

"Managerial Accounting: A Demonstration of Equivalent Units in Process Costing". Presented to the American Society of Business and Behavioral Sciences, Las Vegas, NV. (February 2009).

"Changes in the Taxpayer-Tax Prepare Relationship: The Effects of Circular 230", Presented to the Allied Academies International Conference, Reno, NV (October 2007).

"Current Audit Research: Lessons for Practice from Academe" Presented to the AAA Northeast Region Meeting (April 2007).

"Linking Academic Research and the Accounting Practitioner through Student-Prepared Practitioner Summaries" Presented to the American Society of Business and Behavioral Sciences, Las Vegas, NV (February 2007).

"Auditing and Assurance Services: Bridging the Gap between Research and Practice": Poster Session presented to the American Accounting Association Annual Meeting, Washington, DC (August 2006).

"Ethics Standards for the Professional Tax Practice: New Developments". Presented to the Midwest American Accounting Association, Chicago, Ill. (March 2006).

"Circular 230 and the Statements of Standards for Professional Tax Practice". Presented to the 2005 International Allied Academies, Las Vegas, NV (October 2005).

"Case Studies for Introductory Tax: Integrating Research with Ethics", Presented to the Regional Mid-Atlantic AAA meeting in Philadelphia, Pa. (March 2005) and the Annual meeting of the American Accounting Association, San Francisco, CA. (August 2005).

"Ethics Issues in Professional Tax Practice" Presented to the Seventh Annual Ethics Colloquium" (with R. Powell) San Francisco, CA. (August 2005).



“Expenses of Education: Deduction for Advanced Business Degrees” Presented to the Northeast Regional American Accounting Association (April 2005).

“Assurances of Learning and Outcome Assessment” Integrating Accreditation with The Scholarship of Teaching and Learning, One-hour forum presentation to the Carnegie Academy for the Scholarship of Teaching and Learning, Atlanta, GA. (March 2005).

“Student Retention: Taking Another Look. Integrating Ethics Education into the Curriculum” Presented to the Carnegie Academy for the Scholarship of Teaching and Learning. San Diego, CA. (April 2004).

“Examination Retakes and Learning Retention”. Presented to the Teaching and Learning Conference. Orlando, Fla. (January 2004).

“Integrating Ethical Development in the Auditing Classroom: A Survey of Current Practice”. Presented to the Mid-Atlantic American Accounting Association. Philadelphia, PA. (March 2003).

“Writing for the Real-World: Discipline-Specific Assignments in Accounting,”  
Writing Across the Curriculum, Indiana State University (June 2001).

“Accounting Education: Still in a State of Change” Southeastern American Accounting Association, Tampa, Florida. (With S. Foster) (April 2001).

“Exam Retakes: Increased Learning by Writing after the Exam” Writing across the Curriculum Conference, Cornell University (June 1999).

### **Invited Presentation**

Arkansas CPA Association – Accounting Education Workshop “Accounting Education: An Overview of Best Practices from Research and Master Teachers” Virtual (April, 2020)

Louisiana CPA Association - Accounting Education Workshop “Accounting Education: An Overview of Best Practices from Research and Master Teachers” Baton Rouge, LA (April, 2019)

### **Panel Discussions/Other Presentations**

Southeast American Accounting Association (SEAAA), Collaborative Teaching Strategies (Panel organizer, moderator, presenter) Atlanta, Ga. (April 2016).

Churyk, N., Fogarty, T., Rupert, T. Alternatives in Publishing Accounting Education, (Webinar) (March 2016).

SC Association of Accounting Educators, “Accounting Educator Resources” (February 2016).

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, NC. (April 2015).

SEAAA, "Tackling Teaching Together," American Accounting Association, Asheville, NC. (April 2015).

Saracina, Tara; Bolt-Lee, Cynthia; Godfrey, Earl *Debits & Credits vs. Financial Statement Users Approach Does the teaching approach affect Financial Accounting Student's Success Rates?* Panel discussion presented to the SEAAA, St. Petersburg, Fla. (April 2014).

"Tackling Teaching Together" Conference on Teaching and Learning Accounting, American Accounting Association, Atlanta, GA. (August, 2014).

Bolt-Lee, C. et al. *Ways to Get Involved in the Teaching, Learning and Curriculum Section* Panel discussion presented to the American Accounting Association Annual Meeting Anaheim, CA. (August 2013).

"Tackling Teaching Together" (with S. Crosson) Presented to the Southeast American Accounting Association, Nashville, Tenn. (April 2013).

"Tackling Teaching Together" Presented to the SEAAA, Savannah, Ga. (April 2012).

"Tackling Teaching Together" Presented to the Conference on Teaching and Learning Accounting, Denver, CO (August 2011).

"Tackling Teaching Together" Presented to the Conference on Teaching and Learning Accounting, Washington, DC (August 2012).

"The Impact of Research" Panel discussion representing the American Accounting Association Research Impact committee along with the AACSB Research Impact committee at the Ohio AAA. Geneva-on-the-Lake, OH (May 2009).

"Research Impact Task Force of the AAA: The Cup is (More Than) Half Full: The Impact of Academic Accounting Research on the Professional Practice of Auditing, Tax, and Accounting" (with S. Moehrle, K. Anderson, F. Ayres, R. Debreceny, M. Dugan, C. Hogan, M. Maher, and E. Plummer) Presented at the American Accounting Association National Meeting, Orange County, CA. (August 2008).

"Recruiting Professionally Qualified Accounting Faculty" Panelist: AAA Continuing Professional Education: NYC, NY (April 2008).

## **Other Scholarly or Professional Activities**

**CPA Exam Author\***

Uniform CPA Exam. Question author in the areas of Individual Taxation, Regulation, and Auditing. (2009 – 2012)

Invited for the following exam question writing workshops in Washington D.C, San Diego, CA, Chicago and Philadelphia. Areas of expertise: tax ethics, tax law, and tax research.

\*Compensation Received

## **Other Positions and Employment**

Ernst & Young, LLP, 1989-1991

Tax senior

Performed tax research, tax planning, and tax planning for individuals, corporations, trusts, estates and pension plans with a team of experienced tax professionals

Supervised audit teams

Deloitte Touche 1988-1989

Staff Auditor

Audited corporate entities in financial services, hospitals, manufacturing, and shipping

South Carolina Federal Bank 1987-1988

Implemented SFAS 91 (new accounting standard accounting for nonrefundable fees and costs in the banking industry) on a consulting basis while attending graduate school

Dixon Hughes Goodman, LLP 1983-1988

(Formerly Thayer C. Boswell, CPA/Chellis Mitchum, CPA's/ Gamble Givens & Moody CPA)

Managed tax, audit, consulting, advisory and financial statement preparation.

## **Professional Affiliations**

Member of the American Accounting Association

Association of Program Leaders Group (APLG) (2021/2022)

Teaching and Learning and Curriculum Executive Board (elected Secretary, 2015-2017; Treasurer, 2017-2019)

TLC Membership Committee Chair (2013-2014)

Southeastern Region

Beta Gamma Sigma

Member of American Institute of CPA's

Licensed CPA in South Carolina

Forty hours current Continuing Professional Education (CPE) annually to maintain licensure.

Member of South Carolina Association of CPA's (1999 – current).

On-Campus Champion for SCACPA promoting student membership

Chair, Education Committee (1999-2000).

Member of Coastal Chapter of SCACPA's, 1985-2000.  
Student Liaison, Scholarship Committee.

Member of the Citadel Academy for the Scholarship of Teaching, Learning and Evaluation (CASTLE) (2002 – 2008).

### **Appointments: American Accounting Association and other**

Issues in Accounting Education Steering Committee. Charged with reviewing the aims and scope of the journal and review the call for nominations for the new editor. (2017-2019)

Innovation in Accounting Education Award Committee: American Accounting Association (2018-2019)

Pathways Commission: Taskforce Chair to disseminate practice relevant academic research to practice through work with all sections of the American Accounting Association (2013-2015).

Innovation in Accounting Education Award Committee: American Accounting Association (2012-2013).

Southeast American Accounting Association: Planning Committee (2013-2016). Worked on mid-year meeting scheduling.

Southeast American Accounting Association: Membership Engagement Committee Chair (2013 - 2016). Initiatives included contact with smaller colleges near the conference, and new members in AAA located in the region.

Teaching, Learning & Curriculum section of the AAA: Membership Committee Chair (2013-2015). Initiatives included outreach to non-member TLC researchers at sections/regions and the annual meeting.

Regions Strategic Task Force for the American Accounting Association: Responsible for examining the current association of the 7 regions in the AAA to determine and effective and efficient restructuring for the 21<sup>st</sup> century (June 2011 – May 2012).

Citadel Trust Auditor Selection Team (2011 - 2013).

Requested to serve on the selection committee for The Citadel's external audit team

Conference on Teaching and Learning Accounting. American Accounting Association Steering Committee: (2007 - 2015).

Impact of Research on Practice, American Accounting Association,  
Selected as the audit expert along with other accounting sub-disciplines from across the US tasked to document the impact of research on accounting practice (2007).

Editorial Board, *Accounting Education, an International Journal*. (2010-2012).

Editorial Board, *The CPA Journal*. (1998–2005).

### **Facilitator/Moderator/Session Chair**

Steering Committee/Facilitator: 11th Annual Conference on Teaching and Learning Accounting. AAA. Washington, DC. August 2018.

Steering Committee/Facilitator: 8th Annual Conference on Teaching and Learning Accounting. AAA. Chicago, Ill. August 2015.

Steering Committee/Facilitator: 7th Annual Conference on Teaching and Learning Accounting. AAA. Atlanta, GA. August 2014.

Steering Committee/Facilitator: 6th Annual Conference on Teaching and Learning Accounting. AAA. Anaheim, CA. August 2013.

Steering Committee/Facilitator: 5rd Annual Conference on Teaching and Learning Accounting. AAA. Washington DC. August 2012.

Steering Committee/Facilitator: 4th Annual Conference on Teaching and Learning Accounting. AAA. Denver. August 2011.

Steering Committee/Facilitator: 3rd Annual Conference on Teaching and Learning Accounting. AAA. San Francisco. August 2010.

Teaching Tip Coordinator/Steering Committee: 2<sup>nd</sup> Annual Conference on Teaching and Learning Accounting. AAA. NYC, NY. August 2009.

Facilitator: 1<sup>st</sup> Annual Conference on Teaching and Learning Accounting. American Accounting Association. Anaheim, California. August 2008.

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

Moderator/Manuscript Reviewer: 2003 Southeast Regional Meeting. Charleston, SC, March 2003.

Moderator/Reviewer: Second Annual Charleston Connections Conference: Innovations in Higher Education, Charleston, SC, May 2002.

Session Chair: Cultivating the Field: Preparatory Techniques for Introducing CAC to a School of Business, Writing Across the Curriculum, Indiana State University, June 2001.

Facilitator: 14<sup>th</sup> Annual Conference on Accounting Education, New Orleans, LA.  
Group discussion leader for conference attendees; conference coordinator of role-play, August 1998.

Session organizer and moderator: "Perspectives from the Public Accounting Profession," South Carolina Association of Accounting Educators, February 1998.

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

### **Manuscript/Book Reviews\***

Text Book Review: Auditing Case Study, Cambridge Press (December 2015).

Text Book Review: Auditing: Cengage Publishing (December 2010).

Textbook Review: Managerial Accounting: Pearson Education (Summer 2009).

Textbook Review: Financial Accounting Fundamentals: McGraw Hill (January 2008).

Power Point Review: Financial and Managerial Accounting: Warren/Reeve (Summer 2007).

Test bank Revision: Financial Accounting, 9<sup>th</sup> edition: Houghton Mifflin (Summer 2005).

End-of-Chapter On-line Problem and Solutions Rewrite: Conversion of short essays to objective question format for Eduspace: Houghton Mifflin Accounting Text Series (Fall 2004).

Journal Review: *Journal of Management Education: Special No. on Teaching Business Ethics* (Fall 2004).

Technical Reviewer: Financial Accounting for the Future Business Leader (Spring 2004).

Manuscript Review: Charleston Connections Conference: Innovations in Higher Education Conference, Charleston, SC (unpaid) (2002, 2001).

Manuscript Review: Association for Business Communication, Southwestern United States Region (March 2002).

Technical Reviewer: Annual Report Project (With Dr. S. Foster and Dr. M. Greenawalt), (unpaid) (2001-2002).

Comparative book review: Houghton Mifflin's Financial and Management Accounting (Fall 1999).

Chapter Review: "Short-Run Decision Analysis" Management Accounting, Houghton Mifflin (1999).

Chapter Reviews: "Determination of Tax," "Itemized Deductions," "Tax Consideration for Investors," "Losses and Bad Debts," "Accounting Periods and Methods." Federal Taxation: Individuals, Prentice Hall. (1993, 1996 and 1997).

Case Review: Decision Sciences Institute (unpaid) (1994, 1996).

\*Compensation Received except as noted

## **SERVICE**

### **Service to the College**

Student Activities & Scholarships 2019  
Elected Chair

Tenure & Promotion Committee 2019  
Appointed representative for Accounting & Finance Department

Faculty Senate 2017-current  
Elected representative for the School of Business

Faculty Excellence Committee (chair) 2016.  
Responsibilities: Developed a mission statement and charter for newly formed committee. Organize and develop procedures for Awards and Sabbaticals.

General Education Working Group (2016-current)  
Ad Hoc committee to address changes to The Citadel's general education curriculum  
Participant at the AAC&U Institute on General Education and Assessment (Boston, June 2016).

Sabbaticals Committee: School of Business representative (2014- 2015). Chair 2016/2017  
Mentor to CSB candidates for sabbatical.

Research Committee: School of Business representative (2010-2013).

Quality Enhancement Program Committee\*: Appointed by the Associate Provost (2013).  
Responsibilities: Selected to implement the QEP for SACS accreditation and to work in curriculum development for CIT 111 and LDRS 411 courses.

Junior Ethics Experience\*: 2019-2012. Trained through the Global Ethics Institute  
Responsibilities: Teach LDRS311.

Communication Across the Curriculum: Committee Member 2004 – 2012  
Responsibilities: Assist with campus-wide events and luncheons

Curriculum and Instruction Committee: 2007-2010  
Impact: Passage of GPA requirement for admission to the CSB

Citadel Faculty and Staff Salary Review Panel: 2004  
Responsibilities: Analyzed employee grievances over pay disputes.

Student Affairs Committee, 2000/2001

Community Relations Committee, 1998/1999/2000

\*Compensation Received

### **Service to The Citadel School of Business**

Student Affairs/Scholarships Committee: 2019 (chair)

Faculty Standards Committee: 2019

Accounting Faculty Search Committee: 2018/2019

Faculty Affairs Committee

Elected Chair (2013-2015) Committee member (2011-2012)

Responsibilities: Modified CSB Tenure & Promotion standards, Post Tenure Review standards, FAC Charter, and Peer Evaluation Standards. Established processes for each document to provide sustainability.

Endowed Chair Search Committee: 2010.

Marketing Faculty Search Committee: 2009.

Coordinator: AACSB Outcomes Assessment: 2002 – 2005.

Information Systems Faculty Search Committee (Chair): 2007.

Accounting Faculty Search Committee: 2003/2004.

Coordinator: CSBA Speaker's Bureau: 1996/2002/2003.

Curriculum Coordinator for Introductory Accounting: 2002-current.

BADM Adjunct Faculty Handbook: design and preparation: 2002.

Undergraduate Program Assessment Committee, 2002-2004.

Secretary, 2002-2004.

Integration of Corps and Classroom Committee

Performed comparative content analysis of military classes and management courses, 1996.

### **Service to the Profession/Discipline**

Teaching, Learning and Curriculum Section of the American Accounting Association: Elected Treasurer (2017-2019).



Conference on Teaching & Learning Accounting (Chair with B. Cunningham) Responsible for coordinating events for a 2-day conference, chairing a committee of 12, and reviewing over 175 submissions including keynote speakers and budgets. San Diego, CA. (2017/2018).

Conference on Teaching & Learning Accounting (Chair with K. Braun) Responsible for coordinating events for a 2-day conference, chairing a committee of 12, and reviewing over 170 submissions including keynote speakers and budgets. NYC, NY. (2016/2017).

Teaching, Learning and Curriculum Section of the American Accounting Association: Elected Secretary (2015-2017).

SC Association of Accounting Educators: Elected Treasurer. February 2016

Southeast American Accounting Association: Conference Planning Committee and chair of Membership Engagement Committee: SEAAA, 2013-2016

Conference on Teaching and Learning Accounting. Program Chair: Teaching Tips- Oversight on over 100 submissions. 2008 – Current

Coordinator: South Carolina Association of CPA's High School Symposium, The Citadel, 2002

VITA program (Volunteer Income Tax Assistance through the IRS) 1992-2003  
Coordinated and instructed an IRS program designed to assist the cadets and community in income tax return preparation

SCACPA Accounting Careers and Academic Relations Committee  
Chairman, 1999  
Committee member, 2000

SCACPA Accounting Careers Committee  
Chairman, 1998  
Vice-Chairman, 1997  
Committee member, 1994-1996

On-line accounting tutor through Houghton Mifflin and Tutor.com 2000/2001

Presentation: "Careers in Accounting," South Carolina Association of Guidance Counselors, Hilton Head Island, January 1999

Planning Committee, South Carolina Association of Accounting Educators, The Citadel, February 1998

Presentation: "Accounting Careers and SCACPA Student Membership," Student Orientation of SCACPA, Columbia, SC, November 1998

## **Service to Students**

Student Academic and Career Advisor: Service to students includes assistance and review of senior resumes, alumni outreach and connection for employment, coordination with Career Services for firm events, individual consulting, student connections for careers upon graduation through guest speakers and outside engagements in accounting through personal contacts, emails, phone calls, and other opportunities. 1991 – present.

Citadel Toastmasters: Judge 2016.

Boeing Women in Leadership Day: 2015.

Santee Cooper: Finance Club field trip chaperone 2015

Battalion Coordinator for training and leadership in the school September 2011 – May 2012. Worked under the Commandant's Leadership Education Program for Fifth Battalion.

Citadel Football Professor of the Game. August 2012

EY Accounting Donation Coordinator: Events included the First Annual Accounting Night Banquet and hiring of a tutor for introductory accounting classes. 2009 – 2011.

Accounting Career Night Coordinator 1990-2004.

Accounting Alumni Committee, 1994/ 1995.

Coordinated events with accounting students and alumni.

Assistant Editor of Departmental Newsletter, *Bulldog Business Briefings*, 1992/1993

SCACPA: Student liaison for the state association of CPA's student membership including scholarship applications, opportunities for collaborations with state professionals, and other interactions. 1998-current.

## **Service to the Community**

Teaching English as a Second Language: Spring 2019

Financial Literacy Classes through Communities in Schools:

- Burke High School Charleston, SC 2015/2016
- Sanders Clyde Middle School Charleston SC 2014/2015
- Lincoln High School McClellanville, SC 2013/2014

Lowcountry Foodbank Volunteer: Managing Food Budgets 2015/2016

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

Volunteers in Literacy: Volunteer in inner-city schools teaching reading to students below grade-level. 2009 – 2014.

Santee Cooper, Consultant 2008.

Kirk Choir: Mt. Pleasant Presbyterian Church: 2006-2016.

James B. Edwards PTA School Board: Fundraising, 2010/2011.

Volunteer Coordinator: “Adopt-a-Classroom” with Citadel cadets and local religious organizations. James Mitchell Elementary School 2004- 2005, 2008.

James Mitchell Elementary: Reading and Library Services 2009/2010.

“Conversations about Debt Reduction and Budgeting,” Presentation to the Welfare to Work Adult Mentoring Program, March 2000.

“Personal Financial Planning,” Presentation to the Junior League of Charleston, Inc. April 1999.

“Beginning Personal Financial Planning,” Presentation to the Adult Mentoring Program, March 1999.

“Roth versus Regular IRA’s” Presentation to The Investment Club, The Citadel, December 1998.

Mt. Pleasant Presbyterian Church, Sunday School Teacher – 7<sup>th</sup> grade (2004).

The Junior League of Charleston, Inc.

Sustainer Transfer Chair 2020/2021

Sustainer Committee 2015/2016

Sustainer 2001 – current.

Chairman, Transfers Committee 2000/2001.

Membership Council 2000/2001.

Youth Mentoring Project 1999/2000.

Community Council Committee 1998/1999.

Summer Enrichment Project, (summer school program for inner city elementary school) Chairman 1998.

Homework tutor, James Simons Elementary School 1995/1996.