SHARON S. LASSAR, PH.D., CPA (FLORIDA)
John J. Gilbert Endowed Professor

Director, School of Accountancy
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NATIONAL AWARDS:

2019 Leadership, Service and Innovation Award, Accounting Programs Leadership Group

2009 AAA Diversity Section Award for Service Excellence as AICPA Committee Member

2005 Educator of the Year, American Woman's Society of Certified Public Accountants

2005 American Taxation Association / Deloitte Teaching Innovation Award

1999 Best Article Award, selected by the readers of *The Tax Adviser*

EDUCATION:

Ph.D.	**University of Southern California**, Los Angeles, May 1989 Business Administration with an emphasis in Accounting and Taxation
M.S.	**Bentley University**, Waltham, Massachusetts, November 1983. Major - Taxation
B.S.B.A.	**West Virginia University**, Morgantown, December 1979. Major – Accounting

PROFESSIONAL LICENSE: Florida CPA number AC-0030657

ACADEMIC POSITIONS

University of Denver, Colorado, Professor and Director, School of Accountancy, 2010 – Present

Florida International University, Miami, 2006 – 2010; Associate Professor and Director, School of Accounting. A national search resulted in my being selected to serve as director beginning in 2007.

Florida Atlantic University, Boca Raton, 1992 – 2006; Assistant and Associate Professor

University of Arizona, Tucson, 1989 – 1992; Assistant Professor

University of Southern California, Los Angeles, 1984-1988; Graduate Teaching Assistant

University of Illinois, Champaign-Urbana, 1984; Graduate Teaching Assistant

Bentley University, Waltham, Massachusetts, 1983; Instructor

PROFESSIONAL EXPERIENCE:

Rand Corporation, Santa Monica, California
1985 - 1986; SAS Programmer for Econometrics.

Arthur Young, Boston, Massachusetts
1980 - 1983; Audit Staff Accountant; Senior Tax Accountant

TEACHING EXPERIENCE:

Traditional Programs:

Survey of Accounting, Accounting Communications, Corporate & Partnership Tax and The Essence of Enterprise, **University of Denver**, 2013-present.
Principles of Taxation and Advanced Taxation, **Florida Atlantic University (FAU),** 1992-2006
International Taxation, a Master of Tax elective, **FAU**, 1995-2003
Tax Research, a Master of Tax requirement and an MBA elective, **FAU**, 2002-2006
Tax Practice, an undergraduate course that includes Volunteer Income Tax Assistance and a focus on tax practice and procedure, **FAU**, 2004-2006
International/Multistate and Advanced Taxation, **University of Arizona**, 1989-1992
Financial and Managerial Accounting, **University of Southern California**, 1984-1988
Intermediate Accounting II, **University of Illinois**, 1984
Introductory and Advanced Taxation, **Bentley College**, 1983

Executive and Overseas Programs:

Tax Research, **Florida International University (FIU),** 2006-2010
Special Topics, **ITAM** (Instituto Tecnológico Autónomo de México**)**, 2008
Taxation of Property Transactions, **FIU**, 2006
Tax Strategies, **FIU**, 2007, Tax course specifically designed for MACC Program
Tax Research, **FAU**, 2003-2006. Distance-based course with web conferencing
Contemporary Tax Topics, **FAU,** 2005-2006. Distance-based focus on Tax Accounting Methods
Financial and Managerial Accounting, Executive MBA Program, **IIUM** (Macau Inter-University Institute), China, 2005. Primary audience of Macanese, Chinese and Portuguese executives
Financial Statement Analysis, Joint Program between **FAU** and **ESIC** (School of Business and Marketing Management), Madrid, 1999. Primary audience of Spanish MBA students

Conference Director:

2016 AAA Annual Meeting Preconference Workshop, New Chairs Symposium, August 7, 2016 Initiated, planned and led the first annual workshop for new accounting program leaders. Secured a dozen notable program leaders for panel discussions.

2015 Accounting Program Leadership Group Annual Conference Chair, February 6-7. Planned the annual meeting of about 230 faculty who lead academic programs. Introduced concurrent sessions targeted to administrators of master degree programs. Secured featured presenter.

2014 Accounting Program Leadership Group Annual Conference Vice-chair, February 9-11. Planned the meeting, moderated multiple sessions and secured the keynote speaker, Paul Stebbins, who was so well-received that he was asked to speak at multiple AAA conferences. Arranged for the leading academic on predatory publishing to give his first ever presentation to accounting academics. The topic became the subject of discussion lasting years, especially in the AACSB community.

Accounting Scholars Development Program, July 1- August 4, 2011, June 24-28, 2012, July 7-11, 2013and July 6-10, 2014. Launched a summer community college outreach program with sponsorship by the AICPA Foundation, Deloitte, EY, KPMG, PWC, Grant Thornton and the Colorado Society of CPAs that brings top minority students from a pool of national applicants to the University of Denver to learn about accounting careers and the process of transferring to a four-year institution. Invited Howard University to serve as a second site starting in 2013 to accommodate the increasing number of qualified applicants.

Accounting Development Program, June 6-11, 2010, FIU. Conceived, developed, secured funding and assured success of the PricewaterhouseCoopers / FICPA Accounting Development Program. This first-in-the-nation summer residency outreach program for community college students interested in transferring to a four-year institution to study accounting drew over sixty students from twelve states to apply for the thirty-five positions.

Minority Summer Residency Program, 2009 and 2010, FIU. Launched a Minority Summer Residency Program and an Accounting Careers and Money Program day camp to encourage diverse high school rising seniors to pursue accounting education.

Vice President – Education of Florida Institute of CPAs, 2009-2010 responsible for oversight of ten annual conferences.

2010 Women's Leadership Summit http://www.ficpa.org/ficpa/ResourceCenter/Women/WLS
CPE Chair of the Inaugural FICPA Women's Leadership Summit

The Florida Institute of CPAs FABExpo, Orlando May 28-30, 2008 and the **Annual Accounting Show,** Fort Lauderdale September 24-26, 2008. Chair of the committee that plans the FICPA's largest conventions. Each draws about 1000 participants. Named "Best Committee" in 2008.

Tax Aspects of a Closely-held Business, June 10-11, 2004, The Wyndham Fort Lauderdale Airport Hotel. Sponsored by **FAU** College of Business. Directed every aspect of this inaugural two-day conference including selecting topics, inviting speakers, preparing participant materials, marketing, and securing continuing professional and legal education certification.

<u>Continuing Education:</u>

Frequent presenter of continuing professional education for CPAs and others. See Pro Bono Speaking Engagements below.

SCHOLARSHIP:

<u>Textbook Chapters:</u>

CCH Federal Taxation Comprehensive Topics – Annually, beginning with 2018 Edition – Author of Chapters 13, 14 and 15, including ancillary materials.

Chapter 13: Tax Accounting
Chapter 14: Taxation of Corporations – Basic Concepts
Chapter 15: Corporate Nonliquidating Distributions

<u>Refereed Journal Articles:</u>

1. Grove, Hugh, Sharon Lassar and Richard S. Leaman (2018) "Tax Law Impacts for Mining

Companies with Foreign Operations," *Oil, Gas & Energy Quarterly*, Vol 66, No. 4, Pages: 573-578.

2. Grove, Hugh, Mac Clouse and Sharon Lassar (2015), "Lessons Learned from CEO Pay and Market Cap Performance in the Mining and Metals Industries," *Corporate Ownership and Control*, Vol 12, No. 4 (May), 813-818.

3. Sonnier, Blaise M., Walfried M. Lassar and Sharon S. Lassar (2015), "The Influence of Source Credibility and Attribution of Blame on Juror Evaluation of Liability of Industry Specialist Auditors," *Journal of Forensic and Investigative Accounting*, Vol. 7, Issue 1(January), 1-37.

4. Grove, Hugh, Sharon S. Lassar and Richard S. Leaman (2013), "Conflict Minerals: Economic Analysis," *Oil, Gas and Energy Quarterly*, Vol. 62, No. 2 (December) 197-212.

5. Grove, Hugh, Sharon S. Lassar and Richard S. Leaman (2013), "Risk Management Using Red Flag Analysis: Fraudulent Financial Reporting in Mining and Other Industries," *Oil, Gas and Energy Quarterly*, Vol. 61, No. 4 (June) 681-694.

6. Sun, Ran, Hugh Grove, Sharon S. Lassar and Richard S. Leaman (2013) "Guidance for Mining Accounting Issues: GAAP, IFRS, and IRS Perspectives," *Oil, Gas and Energy Quarterly*, Vol. 61, No. 3 (March) 443-472.

7. Sonnier, Blaise M. and Sharon S. Lassar (2012), "State Taxation of Remote and Internet Sales: Congressional Options on the Table," *Journal of State Taxation*, Vol. 31, No. 1 (November-December) 19-26.

8. Grove, Hugh, Sharon S. Lassar and Richard S. Leaman (2012), "Rare Earth Minerals Accounting: Challenges by Stage of Operations," *Oil, Gas and Energy Quarterly*, Vol. 60, No. 5 (September) 17-24.

9. Li, Dan, Hugh Grove and Sharon S. Lassar (2012), "Status and Opportunities in the Global Industry of Rare Earth Minerals," *Oil, Gas and Energy Quarterly*, Vol. 60, No. 4 (June) 817-824.

10. Sonnier, Blaise M., Sharon S. Lassar and Walfried M. Lassar (2012), "An Examination of the Influence of Audit Firm Size and Industry Specialization on Juror Evaluation of Liability," *Journal of Forensic and Investigative Accounting*, Vol. 4, No.1 (January) 39-83.

11. Sonnier, Blaise M., Cherie J. Hennig and Sharon S. Lassar (2010), "Protecting Work Product in IRS Disclosures and During the Audit after *Deloitte*," *Taxes – The Tax Magazine*, Vol. 89, No.12 (December) 27-35.

12. Everett, John O., Cherie J. Hennig, Sharon S. Lassar and Blaise M. Sonnier (2010), "The Reversal in *Textron*: Anatomy of a Bad Decision," *Taxes – The Tax Magazine*, Vol. 89, No. 2 (February) 91-100. **Cited in the reply brief for the petitioner on petition for a Writ of Certiorari from the U.S. Court of Appeals for the First Circuit to the U.S. Supreme Court**.

13. Sonnier, Blaise M. and Sharon S. Lassar (2010), "Tax Court Allows Valuation Discount for Membership Interest in Disregarded Entity," *The Journal of Taxation*, Vol. 112. No. 1 (January 2010) 45-52.

14. Lassar, Sharon S. and Blaise M. Sonnier (2009), "Warning: Offshore Payments Watched More Closely," *The Journal of Corporate Accounting and Finance*, Vol. 20, No. 6 (September/October)

47-53.

15. Sonnier, Blaise M. and Sharon S. Lassar (2009), "Can the Attorney-Client and Work-Product Privileges Survive the Annual Audit?" *The Journal of Corporate Accounting and Finance*, Vol. 20, No. 4 (May/June) 9-16.

16. Sonnier, Blaise M. and Sharon S. Lassar (2009), “The *Jelke* Built-in Gain Valuation Discount Method: Proceed with Caution,” *Taxes – The Tax Magazine*, Vol. 87, No. 2 (February) 81-87. Reprinted in CCH Financial and Estate Planning, Report No. 351, March 2009, at Paragraph 33,251 in Volume 3 of the Reporter .

17. Sonnier, Blaise M. and Sharon S. Lassar (2008), “Florida Adds Portability to Its Save Our Homes Relief Measure and Inflation Protection for Non-homestead Real Property,” *Journal of State Taxation*, Vol. 26, No. 6 (September-October) 23-28.

18. Lassar, Walfried M., Sharon S. Lassar and Nancy Rauseo (2008), “Developing CRM Strategy in Your Accounting Firm,” *The Journal of Accountancy*, Vol. 206. No. 2 (August) 68-73.

19. Sonnier, Blaise M., Cherie J. Hennig and Sharon Lassar (2008), “Tax Accrual Workpapers and the Work Product Doctrine after Textron,” *Taxes – The Tax Magazine*, Vol. 85, No. 4 (April) 53-62.

20. Dellinger, Kip and Sharon S. Lassar (2007), “The New Tax Preparer (and Advisor) Penalty Standards under Code Section 6694: A More (or Less) Likely Than Not World,” *The Journal of Tax Practice & Procedure*, Vol. 9, No. 4 (August-September) 19-26. Reprinted for inclusion in CPE programs delivered by TMI Tax Services Group, Inc. in Honolulu in October 2007 and at two locations for the CalCPA Foundation’s Annual Tax and Planning Update in November 2007.

21. Bertolini, Michelle and Sharon S. Lassar (2007), “Service Warranty Companies – The Hybrid of the Insurance Industry,” *The Tax Adviser*, Vol. 38, No. 7 (July) 402-407.

22. Lassar, Sharon S., John O. Everett and William A. Duncan (2006), “Evaluating Razavi-Type Fixed Rental Pool Arrangements: How Important Are Tax Consequences in Making the Investment Decision?” *Taxes – The Tax Magazine*, Vol. 84, No. 10 (October) 29-37.

23. Lassar, Sharon S., John O. Everett and William A. Duncan (2006), “Evaluating Cost Segregation Opportunities before, during, and after the Usage of Qualifying Realty,” *The Journal of Legal Tax Research*, Vol. 4, No. 1, 76-100.

24. Duncan, William A., John O. Everett and Sharon Lassar (2006), “Interest Free Loans to Shareholders: An Opportunity to Reduce Overall Tax Costs,” *The CPA Journal*, Vol. 76, No. 1 (January) 28-32.

25. Everett, John O., William A. Duncan and Sharon S. Lassar (2005), “Assessing the Tax Consequences of a Sale of Rental Property with Varying Degrees of Personal Usage,” *Taxes – The Tax Magazine*, Vol. 83, No. 12 (October) 53-60.

26. Dandapani, Krishnan, Walfried M. Lassar and Sharon S. Lassar (2005), “Virtual Banking: Impetus and Impediments,” *The International Journal of Finance*, Vol. 17, No. 2 (Spring) 3512-3524.

27. Lassar, Walfried M., Chris Manolis and Sharon S. Lassar (2005), “The Relationship between Consumer Innovativeness, Personal Characteristics, and Online Banking Adoption,” *International*

Journal of Bank Marketing, Vol. 23, No. 2 (Summer) 176-199.

28. Orbach, Kenneth N., Sharon S. Lassar and Kathryn M. Means (1999), "Tax and Accounting Aspects of Liquidating a Partner's Interest," *The Tax Adviser* Vol. 30, No. 5 (May) 334-342. **Winner of the 1999 Best Article Award**.

29. Lassar, Sharon S. and Kenneth N. Orbach (1998), "Sale of S Stock by an Electing QSST: A Passive Activity Loss and At-Risk Puzzle," *Journal of S Corporation Taxation*, Vol. 10, No. 1 (Summer) 29-41.

30. Lassar, Sharon S. and J. Scott Vermaas (1997), *"Brown Group* Revisited," *International Tax Journal*, Vol. 23, No. 4 (Fall 1997) 76-98.

31. Kenneth Orbach and Sharon S. Lassar (1996), **"**S Corporations: Are the Sec. 1374 Final Regulations a BIG Improvement?" *The Tax Adviser*, Vol. 27, No 3 (March) 157-165.

32. Lassar, Sharon S (1996), "The Future of Mixed-Source Income: The *Intel* Appeal and Other Threats," *International Tax Journal*, Vol. 22, No. 1 (Winter) 65-82.

33. Lassar, Sharon S and Terrance R. Skantz (1995), "New Transfer Pricing Documentation, Requirements and Penalties," *The CPA Journal*, Vol. 65, No. 4 (April) 36-39.

Refereed Instructional Materials:

34. Lassar, Sharon S, John O. Everett, William A. Duncan and Walfried M. Lassar (2005), "Second Chance for Depreciation: A Case Study Analyzing Tax Planning Opportunities After Asset Disposition," a case study and instructor's manual at http://www.fiu.edu/~mktgctr/case/default.htm **Winner of the 2005 ATA/Deloitte Teaching Innovation Award**.

Conference Papers & Presentations:

35. Lassar, Sharon S, William A. Duncan and John O. Everett (2005), "Evaluating Cost Segregation Opportunities Before, During and After the Usage of Qualifying Realty", *The American Taxation Association Mid-Year Meeting*, Washington, D.C. (Refereed on full paper. Paper was not published.)

36. Dandapani, Krishnan, Walfried M. Lassar and Sharon S. Lassar (2002), **"**Costal Bank Online: Expansion through Online Financial Services", presented by co-author at *The North American Case Research Association Annual Meeting*, Banff, Canada. (Refereed on full paper. Paper was published in proceedings.)

37. Lassar, Sharon S. (2000), "Teaching Taxation to International Managers", *The American Taxation Association Mid-Year Meeting*, Orlando, Florida. (Refereed on abstract. Paper was not published.)

38. Siegel, Gary and Sharon S. Lassar (1998), "Implementing Activity Based Costing in Health Care: Implications for Research, Teaching and Policy", Panel Discussants. *Asian-Pacific Conference on International Accounting Issues*, Maui, Hawaii. (Refereed on full paper. Paper was not published.)

39. Lassar, Sharon S. and Terrance R. Skantz (1995), "Transfer Pricing: The Cost of Insufficient Documentation", *The American Accounting Association*, *Mid-Atlantic Regional Meeting*, Parkersburg, West Virginia. (Refereed on full paper. Paper was published in proceedings.)

40. Lassar, Sharon S. and Leslie Stratton (1995), “Eligibility and IRA Participation”, *The American Accounting Association Southeast Regional Meeting*, Miami, Florida. (Refereed on full paper. Paper was not published.)

41. Lassar, Sharon S. (1994), “Supply Effects of Tax Incentives for the Second Earner”, *The American Accounting Association, Mid-Atlantic Regional Meeting,* Atlantic City, New Jersey. (Refereed on full paper. Paper was published in proceedings.)

42. Lassar, Sharon S. and Suzanne Luttman (1991), “Tax Incentives and the Labor Market Participation of Married Women”, University of Michigan Office of Tax Policy Research Workshop on the Use of Panel Data in Tax Research, April, Ann Arbor. (Refereed on full paper. Paper was not published.)

43. Lassar, Sharon S. (1989), “Methodological Limitations of Tax Accounting Event Studies”, *Fourth Annual University of Southern California Tax Research Symposium*, January, Los Angeles. (Refereed on full paper. Paper was not published.)

44. Lassar, Sharon S. (1988), “Cross-Sectional Tests of Political Costs of a Mandated Depreciation Change in the Railroad Industry”, *The American Accounting Association National Convention*, August, Orlando, Florida. (Refereed on full paper. Paper was not published.)

<u>Competitive Grants:</u>

45. **Accounting Scholars Development Program,** 2011 Grant from AICPA Foundation for $44,500 to develop a pipeline initiative to bring community college students into the accounting profession. 2012 Grant from AICPA Foundation for $22,250 and 2013 & 2014 Grants from AICPA Foundation for $10,000. AICPA Foundation support decreased as firm and other foundation support increased.

46. **International Business Faculty and Curriculum Development Grant**. Center for International Business & Information Transfer, Florida Atlantic University. Awarded several grants on a competitive basis from 1997-1999. Funding provided by Title VIB grants, the proposal process for which I participated.

47. **Eligibility and IRA Participation**, Principle investigator on grant funded by the Ernst & Young Foundation for $18,750 with Leslie Stratton. Awarded in March 1992. Final report submitted December 1992.

48. **Tax Incentives and The Labor Market Participation of Married Women,** Principle investigator on grant funded by KPMG Peat Marwick Foundation for $29,430 with Suzanne Luttman. Awarded in March 1990. Final report submitted June 1991.

<u>Non-Refereed Works:</u>

49. Bisk, Nathan M., Stephen T. Galloway, Alan D. Campbell, and Sharon S. Lassar (2004), “Tax Law Changes 2004: Focus on Jobs Creation and Business Growth.” Course prepared for Bisk Education.

50. Orbach, Kenneth N. and Sharon S. Lassar (2000), “Innocent Spouse, Separate Liability, and Equitable Relief,” *Florida CPA Today* Vol. 16, No. 7 (November/December) 12-16.

51. Gary Siegel Organization, "Measuring Practice Expense In GI And Liver Practices" (1998). Sponsored by American Gastroenterological Association, American Association for the Study of

Liver Diseases, and American Society for Gastrointestinal Endoscopy. Research Team: Arnold Barkman, Yeong Choi, Masako Darrough, Dwight Denison, Gail Eynon Kaciuba, Sharon Lassar, Nancy Mangold, Gary Siegel (project director), Terry Skantz, Neil Wilner, and Tom Zeller.

52. Lassar, Sharon S. (1998), "Tax Advisor-Client Privilege: A Question of Turf?" *Tax Notes*, Vol. 78, No. 11 (March 16) 1435-1436.

53. Moore, Michael L. and Sharon S. Lassar (1999), **"**U.S. Taxation of Transactions in Foreign Currency,**"** Chapter in U.S. Taxation of International Operations, an international tax treatise. Warren, Gorham & Lamont, New York, 1996, pp. 5501-5524.

54. Lassar, Sharon S. (1996), "Book Review: Prentice Hall's Federal Taxation: Corporations, Partnerships, Estates & Trusts: 1996 Edition," in *Journal of the American Taxation Association*, Vol. 18, No. 1 (Spring) 114-116.

55. Moore, Michael L. and Sharon S. Lassar (1992), "Translating Foreign Currency Into U.S. Tax Sense," Chapter in U.S. Taxation of International Operations, Warren, Gorham & Lamont, New York, 1992.

ADDITIONAL AWARDS AND RECOGNITIONS – Since 2000

"Woman to Watch –Leader of Note" Award by Colorado Society of CPAs, 2018
"Outstanding Administrator" Award by University of Denver Center for Multicultural Excellence for launching Accounting Scholars Development Program, 2012
"President's Award" from FICPA for establishing Accounting Development Program, 2010
"Best Professor" Award by Cohort 19 of the Executive MST Program, 2009
"Most Supportive Professor" Award from FIU Accounting Association, fall 2008
"Best Professor" Award by Cohort 18 of the Executive MST Program, 2008
Chair of "Outstanding Committee" of FICPA, 2007-2008
"Best Professor" Award by Cohort 16 of the Executive MST Program, 2007
FICPA Outstanding Educator Nominee 2002, 2005, 2008.
IRS Community Service Award, 2000 - 2006
TIAA-CREF Faculty Service Award nominee 2005, winner 2006.
"Club of the Year" awarded to Accounting Students Association for which I served as faculty advisor, 2005 and 2006.
FAU Faculty Advisor of the Year, 2006.
FAU Distinguished Teacher of the Year, finalist, 2001.

MEDIA (since 2010)
A zip code mixup could be costing Colorado cities money, September 16, 2019
https://www.thedenverchannel.com/news/our-colorado/as-online-shopping-increases-colorado-cities-look-for-a-way-to-collect-the-correct-sales-tax
7 Tax moves to consider before 2019 https://wtop.com/news/2018/11/7-tax-moves-to-consider-before-2019/
Kiernan, John S., "How to fix credit report errors," June 17, 2017, https://wallethub.com/edu/credit-report-dispute/25501/#sharon-lassar
Meyer, Cheryl, "8 tips for finding, hiring, and retaining the best busy season staff," January 17, 2017
http://www.journalofaccountancy.com/newsletters/2017/jan/hiring-retaining-best-busy-season-staff.html?utm_source=mnl:cpald&utm_medium=email&utm_campaign=19Jan2017
Antonacci, Karen, "Longmont, Boulder ink agreements with Amazon for city sales taxes," July 2, 2016, http://www.timescall.com/longmont-local-news/ci_30084321/longmont-boulder-ink-agreements-amazon-city-sales-taxes and http://www.dailycamera.com/top-stories/ci_30084321/longmont-boulder-ink-

agreements-amazon-city-sales-taxes
Nilsen, Kim, "AICPA taking multipronged approach to lead candidates into the CPA pipeline" October 20, 2015. http://www.journalofaccountancy.com/news/2015/oct/cpa-pipeline-next-steps-201513179.html
Thomas, TaRhonda, "Colorado Economy Tops U.S." 9News.com, August 21, 2014. http://www.9news.com/story/money/business/2014/08/21/colorado-top-us-economy/14379829/
Williams, Geoff, "What to do if You Get a Lien on Your House", U.S. News Money, March 26, 2014 http://money.usnews.com/money/personal-finance/articles/2014/03/26/what-to-do-if-you-get-a-tax-lien-on-your-house
Young, Dave, "President Obama Promises to Close Gender Wage Gap", KDVR-TV Fox 31 News, March 20, 2014, http://kdvr.com/2014/03/20/president-obama-promises-to-close-gender-wage-gap/
Kennedy, Bruce, "Seven Sneaky Taxes for 2014", *24/7 Wall Street*, January 10, 2014 http://247wallst.com/special-report/2014/01/10/seven-sneaky-taxes-for-2014/
Wereschagin, Mike, "Paying your taxes a certainty during government shutdown," Pittsburgh Tribune-Review, October 11, 2013. http://triblive.com/news/allegheny/4853171-74/government-shutdown-taxes#axzz2kGhduiFJ
KGNU - Maeve Conran's Weekly Economics Show: October 3, 2013, Guest to discuss economic impact of government shutdown.
Berg, S.Z., "New Health Care Law May Incentivize Some To Work Less", August 22, 2013 http://www.mainstreet.com/article/family/family-health/new-health-care-law-may-incentivize-some-work-less?page=2
Kennedy, Bruce, "Why you should pity Phil Mickelson", MSN Money, February 7, 2013 http://money.msn.com/taxes/why-you-should-pity-phil-mickelson
Williams, Geoff, "5 Things to Remember When Your Finances Are Falling Apart", US Colorado Public Radio interview for Colorado Votes aired October 3, 2012 at 7:50 AM.
Ashby, Charles, "Big issues a matter of debate", *The Daily Sentinel*, October 3, 2012, http://www.gjsentinel.com/special_sections/articles/big-issues-a-matter-of-debate
Plunkett, Chuck, "Colorado ex-Gov. Lamm: Both parties to blame for debt", *The Denver Post*, September 14, 2012, with video of discussion http://www.denverpost.com/news/frontpage/ci_21539526#ixzz28AcS7HxP
Jaffe, Mark, "Cluster of Stars Falling on Taxes", *The Denver Post*, April 17, 2012, page 10A.
"FICPA Introduces PwC Accounting Development Program", *Florida CPA Today*, November/December, pg. 30-31. http://www.ficpa.org/Content/Files/Docs/Flipbooks/2010/FCT/NovDec/index.html
Watch the video http://www.youtube.com/watch?v=lAIPJ7ZuC9w
http://www.youtube.com/watch?v=rmcHFlBId_c&feature=related
People on the Move, The Denver Post, July 21, 2010, http://www.denverpost.com/headlines/ci_15562735
"Executive Committee Highlights Florida CPA/PAC, Ownership in Institute", *Florida CPA Today*, July/August, with photo, pg. 12-14.
http://www.ficpa.org/Content/Files/Docs/Flipbooks/2010/FCT/JulyAug/index.html
"Universities Adjust Curriculum in Response to Economy", *Miami Today*, with photo, June 17, 2010.

SERVICE TO THE COMMUNITY AND CPA PROFESSION (since 2000)

Colorado Society of Certified Public Accountants

Vice Chair of Board of Directors	2019-2020
Trustee of Educational Foundation	2015-2019
President of Board of Trustees of Education Foundation	2017-2018
Board of Directors	2013-2015
Member of Accounting Careers Committee	2010-Present

American Institute of Certified Public Accountants (AICPA)

The Joint AICPA/NASBA Accreditation Task Force	2016-2017

Pre-Certification Education Executive Committee	2012-2018
Chair	2015-2017
Vice Chair	2014-2015
Minority Issues Committee member	2008-2011
Tax Practice Responsibilities Committee member	2004-2007

Community College of Aurora, Business Advisory Board 2012-Present

American Accounting Association/AICPA Joint Awards Selection Committee

Notable Contributions to Accounting Literature, Chair	2014, 2017
Notable Contributions to Accounting Literature, Member	2013, 2018
Distinguished Achievement in Accounting Education, Member	2013-2014

Association of Latino Professionals in Finance and Accounting

National Corporate Advisory Board member	2007-2013
Chair, Woman of ALPFA Award Committee	2011
Chair, Graduate Expansion Committee	2011

City of Miami Audit Advisory Committee 2007-2010

Appointed by Commissioner Tomas Regalado, September 11, 2007
Term ended with Mr. Regalado's election to Mayor of Miami
Shortly thereafter appointed by Commissioner Suarez

Florida Institute of Certified Public Accountants (FICPA)

Vice President	2009-2010
Board of Governors	2008-2010
Member of Women's Leadership Development Task Force	2009-2010
Chair of Financial Literacy Committee	2008-2009
Chair of Accounting Shows Committee – Voted "Best Committee"	2007-2008
Vice Chair of Financial Literacy Committee	2007-2008
Vice Chair of Accounting Shows Committee	2006-2007
Member of Financial Literacy Committee	2006-2010
Member of Accounting Shows Committee & Track Administrator	2004-2010
Member of Chapter Operations Committee	2003-2005
Member of Board of Directors, Broward Chapter	1999-2009

American Woman's Society of CPAs (AWSCPA)

Director & Chair of Scholarship Committee, South Florida Chapter	2000-2010
National Scholarship Committee, founding member	2004-2010

Taxpayer Advocacy Panel, Appointed by Treasury Secretary Paul O'Neil

Chair of Multilingual Issues Committee 2001-2004
Advised IRS on ways to improve customer service.

Volunteer Income Tax Assistance, Site Coordinator

Established site, trained and supervised volunteer preparers 2004-2006

The German School of South Florida, Inc., Treasurer 1996-2005

ACADEMIC SERVICE (since 2010)

AACSB International

AACSB Accounting Accreditation Task Force	2016-2017
Peer Review Team Member	
John Carroll University	February 2019
Quinnipiac University (chair)	April 2017
Idaho State University	October 2016
Loyola University – Chicago	January 2016
St. John's University	January 2015

Accounting Programs Leadership Group

Past-President, chair of nominating committee	2018-2019
Member of APLG/Federation of Schools of Accounting Merge Committee	2018
President	2017-2018
President-elect	2016-2017
Vice President – Organizational Value and Programs	2014-2016
Co-chair of 2014 and 2015 annual conferences	2013-2015
Active member of group of 300 leaders of schools or departments	2007-Present

University of Denver

Daniels Academic Council, Member	2010-Present
Daniels Strategic Hiring Committee, Chairperson	2011-Present
Daniels Inclusive Excellence Committee, Member	2011-Present
Impact 2025 Strategic Planning / Implementation Cluster	2017-Present
Reiman School Director Search Committee	2016-2017
Post-Tenure Review Procedure Committee	2014-2016
Post-Tenure Review Exploration Committee, Member	2013-2014
Miller Professorship Search Committee, Chairperson	2011-2013
University Inclusive Excellence Incubator, Member	2011-2013
Daniels Strategic Hiring Committee, Member	2010-2011
Hilton Chair Search Committee, Member	2010-2011

American Taxation Association

External Relations Committee, Member	2012-2014
External Relations Committee, Chair	2011-2012
Tax Policy Committee, Member	2011-2012

Reviewer of Peer Research

Legal Tax Research, editorial board	2012-2017
Journal of Accounting and Public Policy	2018

PRO BONO SPEAKING ENGAGEMENTS (including CPE programs since 2010):

University of Denver

Young Professional Alumni Network- The Tax Act	February 2018
Political Realities One Year After the 2012 Election: The Debate Continues, Panelist	October 2013
Center on Rights Development, Student Debt, Panelist	January 2013
Lifelong Learning Program, Speaker on U.S. Fiscal Issues	October 2012
A Conversation about the Political State of Play, Panelist	October 2012
Diversity as a Business Imperative	May 2011

Accounting Program Leadership Group Annual Meeting Presentations	
Tips for Managing Pressures	February 2019
Is Certification Still Important?	February 2017
The Value of Accounting Accreditation	February 2016
Sensitive Situations - How to help faculty reset, reengage, or retire	February 2015
Future of Higher Education: Opportunities and Challenges	February 2014
Assuming Leadership Role	February 2011
American Accounting Association Annual Meeting Panel Presentations	
The Reawakening of the School of Accountancy Movement	August 2016
Community College Strategies – Identifying Talented Students	August 2015
Community College Strategies – Identifying Talented Students	August 2014
Evaluating Strategies that Prepare Students for Success	August 2013
Strategies for Transfer Success	August 2012
Addressing the Transfer Gap, Panel chair	August 2011
Accounting Program Leadership Group New Chairs Symposium	
Advisory Boards	August 2017
AICPA Fall 2015 Council Meeting	
The Research Driven Pipeline Strategy	October 2015
Western States Association of Tax Administrators annual conference	
Recruiting & Hiring Accounting Professionals	September 2015
The Denver Post Breakfast Insights: "How The West Will Be Won:	
Issues That Will Swing a Swing State", Panelist	September 2012
AICPA & CPA/SEA Interchange 2011, Panelist	
Diversity: How Important Is It? Should you Designate Resources	
Toward Student Outreach Initiatives?	July 2011
Platte River Business Club "Tax Policy and Its Impact on Economic Growth"	April 2011
Colorado Society of CPAs: The new education requirements for licensees	March 2011
FICPA Accounting Show – Tax Research, Fort Lauderdale, FL	September 2010
FICPA Annual FabExpo – Tax Research, Tampa, FL	June 2010
FICPA Minority Summer Residency Program - Miami	
True Colors Leadership Style	June 2010
Accounting Development Program - Miami	
Introduction to Taxation	June 2010
AICPA Student Leadership Workshop – Chapel Hill, NC	
Acing the CPA Exam & My Life as a CPA	May 1010

Information about activities prior to the dates indicated is available upon request.