TEXAS STATE VITA

I. Academic/Professional Background

A. Name and Title

Name: Dr. Linda J. Campbell, PhD, CPA, CGMA Title: Associate Professor

B. Educational Background

Degree	*Year*	*University*	*Major*	*Thesis/Dissertation*
PHD	2010	Univ of Texas at San Antonio	Accounting	
MBA	1977	Texas A&M Univ-Corpus Christi	Management	
BBA	1973	Texas A&M Univ Kingsville	Economics	

C. University Experience

Position	*University*	*Comments*	*Dates*
Associate Professor	Texas State University		August 2015 - Present
Assistant Professor	Texas State University		August 2009 - August 2015
Instructor and RA	The University of Texas at San Antonio	While in PhD program: taught undergraduate Individual and Corporate Federal income tax and Principles of Accounting I.	August 2005 - May 2009
Adjunct Instructor	Alamo Community Colleges - Northwest Vista College		2005
Adjunct Instructor	Del Mar College - Corpus Christi (on-line courses)		2005
Adjunct Instructor	University of the Incarnate Word		2000 - 2005
Assistant Professor	Del Mar College - Corpus Christi, TX	Taught a wide array of accounting and banking courses.	2000 - 2004

Position	*University*	*Comments*	*Dates*
Adjunct Instructor	Austin Community College		1997 - 1999

D. Relevant Professional Experience

Position	*Entity*	*Comments*	*Dates*
Tax Accountant - seasonal	RJM Business Solutions, Inc. - Fredericksburg, TX	H&R Block franchise; Seasonal tax preparation	1996 - 1999
Executive Management Recruiter	Robert Half International - Detroit, MI	Recruiter for Accounting and IS top level personnel for numerous national, regional, and local firms	1987 - 1990
Tax Manager	Deloitte, Haskins & Sells - London, UK	UK public accounting offices later merged with Pricewaterhouse	1985 - 1987
Management/Executive/CPA	Various Management Positions in Different Industries & Public Accounting - Corpus Christi, TX		1974 - 1984

E. Other Professional Credentials (licensure, certification, etc.)

Chartered Global Management Accountant, AICPA. (2014 - Present).

Certified Public Accountant, Texas State Board of Public Accountancy. (1984 - Present).

Additional Comments: Texas

II. TEACHING

A. Teaching Honors and Awards:

Award / Honor Recipient: Teaching Award of Honor, TXST Alumni Association. June 2020

Award / Honor Recipient: Alpha Chi Favorite Professors for 2011.
April 2011
Additional Comments: Honored with recognition at spring induction ceremony

B. Courses Taught:

Texas State University:

ACC 2362 - INTRO TO MGRL ACC

ACC 4328 - SURVEY INCOME TAX

ACC 5315 - TOPICS IN FIN ACC

ACC 5340 - INDIVID TAX ACCT

ACC 5350 - PROF ACCT RESEARCH

ACC 5372 - TAX RESEARCH

University of Texas at San Antonio:

ACC 3043 - Federal Income Taxation

ACC 6073 - Advanced Corporate Taxation

University of the Incarnate Word:

Advanced Federal Income Tax (Corporate)

University of the Incarnate Word :

Federal Income Tax (Individual)

D. Courses Prepared and Curriculum Development:

ACC 2362 Intro to Managerial Accounting conversion to Asynchronous format, Curriculum Development, Texas State University. Taught: August 2020 - December 2020.

ACC 4328 Survey of Taxation Conversion to Asynchronous Format, Curriculum Development, Texas State University. Taught: August 2020 - December 2020.

G. Teaching Professional Development Activities Attended

Conference Attendance, "EY Foundation 2021 Tax Educators Symposium (zoom)," EY. (October 15, 2021).

Continuing Education Program, "Discipline Concurrent Deep Dive Discussions - Tax Compliance & Planning," American Accounting Association. (June 30, 2021).

Conference Attendance, "AAA 2021 CGMA Teaching Symposium," AAA - MAS. (January 5, 2021).

Continuing Education Program, "Increasing Student Engagement in Virtual Classes - webinar," AAA Research and Education. (October 30, 2020).

III. SCHOLARLY/CREATIVE

A. Works in Print (including works accepted, forthcoming, in press):

2. Articles:

a. Refereed Journal Articles:

Conn, C. T., & Campbell, L. J. (2021). The Ethics of Worker Classification in a Gig Economy. *Research on Professional Responsibility and Ethics in Accounting*, *24*, 205–219. https://doi.org/10.1108/S1574-076520210000024011https://doi.org/10.1108/S1574-076520210000024011
worker-class-RPREA-210910-1.pdf
Additional Comments: "B" rank for journal per Accounting Department. Journal is ranked, abstracted and indexed by: ABS (UK), Cabell's Directory of Publishing Opportunities in Accounting, Summon (ProQuest), Thomson Reuters Book Citation Index, Scopus.
Refer to attached file for copy of article.

Campbell, L. J., Martin, K., & Pitman, M. (2020). Employee-paid Business Expenses: Is an Accountable Plan the Answer? - Featured Article. *The CPA Journal*, (April 2020), 48–51.

Campbell, L. J., Smith, P., & Martin, K. (2019). Defining “Reasonable Compensation” under the Tax Code. *The CPA Journal*, *October 2019*, 16–21.

Conn, C. T., Campbell, L. J., & Raiborn, C. A. (2019). External Auditors, Client Ethics, and the Continuance Decision. *Research on Professional Responsibility & Ethics in Accounting*, *22*, 133–149. https://doi.org/10.1108/rprea
www.emerald.com/insight/publication/doi/10.1108/S1574-0765201922
client-ethics-RPREA-190136-Ch06-proof-1.pdf
Additional Comments: "B" rank for journal per Accounting Department. Journal is ranked, abstracted and indexed by: ABS (UK), Cabell's Directory of Publishing Opportunities in Accounting, Summon (ProQuest), Thomson Reuters Book Citation Index, Scopus. This article

won the **2020 Literari Award for Excellence** from Emerald Publishing. Crosslisted under Awards.

Pitman, M., Campbell, L., & Martin, K. (2017). U.S. tax and FASB's new paradigm for revenue recognition. *Journal of Accountancy*, (June 2017), 62–71.

Campbell, L. J. (2017). Family-Owned Business Succession Planning. *Strategic Finance*, (April 2017), 20–22.

Campbell, L., Smith, P. C., & Willis, V. (2015). Muddling Parity of an Energy Efficient Incentive - Through the Lens of "Change in Accounting Method." *Journal of Legal Tax Research*, *13*(2), 82–94.

Campbell, L., & Smith, P. C. (2015). Governance: Taxes - Keeping An Eye on Lady Luck. *Strategic Finance*, (October), 12–14.

Campbell, L., Martin, K., & Liu, L. (2015). Accrual Earnings Management Prior to Delisting. *Journal of Accounting and Finance*, *15*(3), 53–63.

Campbell, L., & Jones, L. C. (2015). Governance: Global Fight Against Tax Evasion. *Strategic Finance*, (April), 12–14.

Campbell, L., & Pitman, M. K. (2015). A Cautionary Alert - Limited Investors Guidance Provided By Small Companies: As Evidenced By FIN 48 Related Topic 11.M Disclosures Within Micro Cap Firms. *International Journal of Accounting, Auditing and Performance Evaluation*, *11*(2), 107–129.

Campbell, L., Jones, L., & Smith, P. C. (2014). An Exegesis of the IRC Sec. 107 Housing Exemption. *Journal of Legal Tax Research*, *12*(2), 16–33.

Campbell, L., & Jones, L. (2014). Automatic Information Exchange and Enhanced Transparency. *The CPA Journal*, *October*, 32–37.

Campbell, L., Raiborn, C., & Butler, J. (2014). Bunko in a Boom Organization: Minimizing Fraud during a Boom Business Cycle. *Management Accounting Quarterly*, *16*(1), 1–12. Retrieved from www.imanet.org/resources_and_publications/management_accounting_quarterly.aspx/ www.imanet.org/resources_and_publications/management_accounting_quarterly.aspx/

Campbell, L., Knowles, R. L., & Martin, K. (2014). Disappearing Act: Insight for the Management Accountant on Recently Delisted US Companies. *Management Accounting Quarterly*, *15*(2), 21–30.

Campbell, L., Smith, P. C., & Hostetler, M. (2013). Traversing the Regulatory Maze of Charity Care: The Institutional Method and IRC Sec 501(r). *Journal of Legal Tax Research*, *11*(2), 68–85.

Campbell, L. (2012). Taking Individual Charitable Giving to Its Limit. *The CPA Journal*, *Sept*, 58–63.

Campbell, L. (2011). US Taxation and the Non Resident Alien. *Strategic Finance*, *October*, 8–10.

Campbell, L., & Martin, K. (2010). Building a Community VITA Program: A Win-Win Partnership for CPA Firms, New Tax Staff, and Current Accounting Students. *Today's CPA*, *November/December*, 24–26.

Campbell, L., & Lopez, D. (2010). Small Cap Financial Reporting: Determinants of Emphasis and Placement of Non-GAAP Disclosures. *Research in Accounting Regulation*, *22*(2), 114–120.

Campbell, L., & Pitman, M. K. (2009). Post-Regulation G: Non-GAAP Reporting. *Research in Accounting Regulation*, *21*(2), 100–106.

B. Works Not in Print:

1. Papers Presented at Professional Meetings:

Butler, J. B., Campbell, L., Raiborn, C. A., Texas Wine and Grape Growers Association Annual Conference, "Things You Need to Know about Accounting...But Probably Didn't," Texas Wine and Grape Growers, Irving, TX, United States. (February 22, 2018).

Campbell, L. (Author Only), Martin, K. (Author Only), Liu, L. (Presenter & Author), Best Paper Award at AAA-Southeastern Regional; Research funded by Texas State University Grants, "Earnings Management Prior to Delisting," Nashville, TN. (April 5, 2013).

Martin, K. (Presenter & Author), Campbell, L. (Author Only), American Accounting Association 2012 Public Interest Section Meeting, "Disappearing Act: An Analysis of U.S. Companies Delisting from Major U.S. Stock Exchanges," American Accounting Association, Orlando, FL. (March 23, 2012).

Martin, K. (Presenter & Author), Campbell, L. (Presenter & Author), Texas State University College of Business Administration Faculty Research Presentation, "Earnings Management Prior to Delisting," Texas State University McCoy College of Business Administration. (September 17, 2010).

Campbell, L. (Presenter & Author), AAA Annual Meeting, "FIN 48 and Micro Cap Firms," American Accounting Association, San Francisco. (August 2010).

Campbell, L. (Presenter & Author), Southeast Regional AAA, "FIN 48 and Micro Cap Firms," American Accounting Association, Mobile, AL. (April 2010).

2. Invited Talks, Lectures, and Presentations:

Campbell, L. J., "NSite - Entrepreneurial Start-up & Financial Reporting Needs," NSite - Northside School of Innovation, Technology, and Entrepreneurship, NSite (formerly Business Careers at Holmes HS), San Antonio, TX. (March 9, 2020).

Additional Comments: Presented two different times (2 class periods) to Senior and Junior Level HS Students

Campbell, L. J., 2018 Wine Acct. 101 "Tax vs Financial Accounting" Lecture, "Seminar," Texas Wine & Spirits Alliance. (November 3, 2018).

Campbell, L. J., 2018 Annual Conference, "Always a Business, Never a Hobby - Understanding the Tax Rules," Texas Wine & Grape Growers Association. (February 24, 2018).

Campbell, L., Accounting Educators Conference, "Taxation Issues - Using VITA in the Classroom," TSCPA, Austin. (October 26, 2013).

Campbell, L. (Presenter & Author), Martin, K. (Author Only), Knowles, R. L. (Author Only), AAA Annual Meeting, "Disappearing Act: Analysis of US Companies Delisting from Major US Stock Exchanges." (August 2012).

Campbell, L. (Discussant), Accounting Educators Conference, "Round Table Discussant: Tax Issues and Practices," Texas Society of CPAs, Austin. (October 2011).

Campbell, L. (Presenter & Author), Lopez, D. (Author Only), Southwest Regional AAA, "Small Cap Financial Reporting: Determinants of Emphasis and Placement of Non-GAAP Disclosures," American Accounting Association, Houston, TX. (March 2008).

Campbell, L. (Presenter & Author), Pitman, M. (Author Only), AAA Annual Meeting, "Post-Regulation G: Non-GAAP Reporting," American Accounting Association, Chicago, IL. (August 2007).

Campbell, L. (Presenter & Author), Pitman, M. (Author Only), Southwest Regional AAA, "Post-Regulation G: Non-GAAP Reporting," American Accounting Association, San Antonio, TX. (February 2007).

5. Other Works not in Print:

b. Works "in progress":

Journal Articles:

Conn, C. T., & Campbell, L. J. (In Preparation; Not Yet Submitted). Gig Worker Classification: A Global Comparison. *To Be Determined*.

Campbell, L. J. (In Preparation; Not Yet Submitted). Facing the Hurdles of Loss Limitations under TCJA. *Target - The CPA Journal*.

Campbell, L. J., & Martin, K. (In Preparation; Not Yet Submitted). Hard Consequences of Sec 121 Exclusion of Capital Gains Tax from Home Sale. *Target - Journal of Accountancy*.

Campbell, L. J., & Martin, K. A. (In Preparation; Not Yet Submitted). Rethinking Existing Higher Education Tax Disparity. *Target - The ATA Journal of Legal Tax Research (JLTR)*.

Campbell, L. J., Knowles, R., & Martin, K. (In Preparation; Not Yet Submitted). When Your Client's Retirement Plan is to "Not Retire." *"B" Rated Journal*.

Additional Comments: Revised due to tax updates in late 2020; received 'revise and resubmit' in mid 2021. Substantial revision now required to recent extensive tax law changes and proposals.

c. Other Works Not in Print:

Posters:

Campbell, L. (Presenter & Author), Pitman, M. (Author Only), AAA Annual Meeting, "FIN 48 Related Topic 11.M Disclosures," American Accounting Association, Denver. (August 2011).

Campbell, L. (Presenter & Author), Lopez, D. (Author Only), AAA Annual Meeting, "Small Cap Financial Reporting: Determinants of Emphasis and Placement of Non-GAAP Disclosures," American Accounting Association, NY. (August 2009).

C. Scholarly / Creative Grants and Contracts:

D. Scholarly / Creative Fellowships, Awards, Honors:

Award / Honor Recipient: Literati Awards 2020 - Outstanding Author Contribution, Emerald Publishing Limited.
December 1, 2020

Additional Comments: "External Auditors, Clients Ethics, and the Continuance Decision" published in *Research of Professional Responsibility and Ethics in Accounting, 2019*

Award / Honor Recipient: 2018 McCoy College Achievement Award for Excellence in Scholarly/Creative Activities.
August 2018

Award / Honor Recipient: Gary V. Woods Research Award, McCoy College of Business Administration.
August 20, 2015
Additional Comments: 2014-2015 Annual Award

Award / Honor Recipient: Annual Lybrand Award - Bronze Medal for Outstanding Article of the Year, IMA - Association of Accountants and Financial Professionals in Business.
June 23, 2015
Additional Comments: Management Accounting Quarterly, Fall 2014 article, "Bunko in a Boom Organization".

Award / Honor Recipient: 2014 College Achievement Award for the Presidential Award for Excellence in Scholarly/Creative Activities, McCoy CBA.
August 23, 2014

Award / Honor Recipient: Best Paper Award - SE Regional Conference, American Accounting Association.
April 2013

Award / Honor Recipient: Runner-up for the McGraw-Hill/Irwin Distinguished Paper Award, SW Regional Conference, American Accounting Association.
2008

E. Scholarly / Creative Professional Development Activities Attended:

Continuing Education Program, "Getting Employees to Speak Up with Ethical Concerns," IMA - Chapter Meeting. (December 2021).

Hosted Tax Managers from RSM, "Why A Career in Taxation....," RSM. (November 2021).

Conference Attendance, "2021 Tax Educators Symposium," EY. (October 2021).

Continuing Education Program, "A New Paradigm in Retirement Planning," CPA Academy1.5. (July 21, 2021).

Continuing Education Program, "Tax Compliance and Planning," NASBA. (June 2021).

Continuing Education Program, "Biden's Tax Proposals: First Look at the Pending Storm," CPA Academy. (June 7, 2021).

Continuing Education Program, "Unpacking Biden's Tax Green Book," Grant Thornton. (June 6, 2021).

Continuing Education Program, "Intl Tax for Athletes, Entertainers, and their Advisers," CPA Academy. (May 17, 2021).

Continuing Education Program, "Fear is Not a Dead End," TXCPA. (April 29, 2021).

Continuing Education Program, "IRS Transfer Pricing Victory in Coca-Cola: What it means...," Thomson Reuters. (April 20, 2021).

Continuing Education Program, "The First 100 Days of Biden Administration - Tax Policy," KPMG. (January 8, 2021).

Conference Attendance, "AAA 2021 Management Accounting Section Mid Year Meeting," American Accounting Association. (January 6, 2021).

Additional Comments: Virtual Conference (due to Covid-19)

Continuing Education Program, "Auditing Culture and Ethics Values in An Organization," Verracy LLC. (December 11, 2020).

Continuing Education Program, "Ethics for Texas CPAs," TXCPA CPE Foundation. (November 19, 2020).

Continuing Education Program, "Forms 1065 and K-1: IRS Throws Rocks (Update)," Texas Society of CPAs. (November 16, 2020).

Conference Attendance, "EY Foundation 2020 Tax Educators Symposium," Ernst & Young. (October 16, 2020).

Continuing Education Program, "Tax Accounting Quarterly," Grant Thornton. (June 19, 2020).

Continuing Education Program, "Domicile Planning for Your Client," Texas Society of CPAs. (June 17, 2020).

Continuing Education Program, "KPMG Teaching Tax Provisions," KPMG. (May 20, 2020).

Continuing Education Program, "Cybersecurity Awareness:Building Your Cyberspace Vocabulary," LindedIn. (May 15, 2020).

Continuing Education Program, "Cybersecurity Training," Texas State University. (May 14, 2020).

Seminar, "PWC Data Analytics and Automation Academy," PWC, Dallas, TX. (October 3, 2019 - October 4, 2019).

Faculty Externship, "New Braunfels Utilities Externship," NBU, New Braunfels, TX. (August 15, 2019).

Conference Attendance, "PwC Accounting and Taxation Symposium," PriceWaterhouseCoopers, San Francisco, CA. (August 8, 2019 - August 9, 2019).

Continuing Education Program, "Tax Accounting Quarterly Update," Grant Thornton. (June 19, 2019).

Continuing Education Program, "Personal & Professional Ethics for Texas CPAs," Thomson Reuters. (December 23, 2018).

Continuing Education Program, "Ridout and Barnett CPA - CPE seminar on Partnership Tax." (August 2018).

Continuing Education Program, "Real Estate Taxations - Sales and other Dispositions," Thomson Reuters. (August 2, 2018).

Continuing Education Program, "49 Things Small Business Owners Need to Know About the New Tax Law," Thomson Reuters. (July 29, 2018).

Continuing Education Program, "Residential Real Estate - Income and Expenses," Thomson Reuters. (July 28, 2018).

One on One Meeting, "Research Open Door Event," McCoy College Asst. Dean of Research. (March 22, 2018).

Speaker and Participant, "Texas Wine & Grape Growers Annual Meeting." (February 2018).

Dissertation Defense, "Jean Bradley Phd Defense," UTSA. (November 2017).

Conference Attendance, "Texas Wine Grape Growers Association," Fredericksburg, TX. (November 5, 2017 - November 6, 2017).

Workshop, "Wine & Spirits Consortium Research Workshop for McCoy Faculty." (October 27, 2017).

Tutorial, "Thomson Reuters Tax Research Update," Thomson Reuters. (August 28, 2017).

Continuing Education Program, "Midyear Federal Tax Update," TSCPA - San Antonio, San Antonio. (August 16, 2017).

Conference Attendance, "Texas Wine Grape Growers Association Annual Conference," San Marcos, TX. (February 16, 2017 - February 17, 2017).

Continuing Education Program, "Tx State Board Ethics and Values for CPAs and Accountants," Austin, TX. (December 14, 2016).

Conference Attendance, "American Certified Fraud Examiners Fall Seminar," Austin, TX. (December 12, 2016).

Seminar, "Woods Awards Research Presentation by Brian Miller," MCoy CBA. (November 2016).

Workshop, "Foundations of Online Course Design and Development," Texas State University. (May 23, 2016 - June 3, 2016).
Additional Comments: Meets SACSCOC requirements for online instructors.

Workshop, "AACSB Seminar: Online and Blended Education," AACSB, Boston. (April 1, 2016 - April 2, 2016).

Workshop, "McCoy Faculty Research by D. Butler & J. Long." (February 26, 2016).

Conference Attendance, "PwC Annual Tax and Accounting Symposium," Chicago. (August 6, 2015 - August 7, 2015).

Webinar Technical Training, "Creating Engaging PP Presentations," Thomson Reuters. (July 1, 2015).

Workshop, "Multicultural Curriculum Transformation & Research Institue," Texas State University. (May 18, 2015 - May 22, 2015).

Workshop, McCoy CBA. (April 10, 2015).

Webinar Technical Update, "Interpreting the New Revenue Recognition Standard," AICPA. (February 23, 2015).

Technical Update, "Revenue Recognition: What Actions Companies Can Take to Prepare," PricewaterhouseCoopers. (February 22, 2015).

Research Presentation by Dr Ha-Chin Yi, "Earnings Management and Bank Loan Contracting," McCoy CBA - Fin/Econ Department. (February 20, 2015).

Technical Update/Training, "Revenue Recognition - Overview of Changes," Thomson Reuters. (February 20, 2015).

Guest Speaker - Mary C. Gentile, PhD, "Giving Voice to Values," McCoy CBA. (February 13, 2015).

Webinar Technical Update, "ACA Provisions to Know for 2014 Individual Returns," AICPA. (January 28, 2015).

Technical Update/Training, "Tax Strategies for Nontraditional Couples," Thomson Reuters. (January 13, 2015).

Technical Update, "A Close Look at Cash Handling," TSCPA- Austin Chapter, Austin. (January 12, 2015).

Additional Comments: In connection with annual meeting

Webinar Technical Update, "Federal Tax Update - Recent Regulatory Changes (2014/2015)," Thomson Reuters. (December 19, 2014).

Webinar Technical Update/Training, "2014 Individual Tax Update," Thomson Reuters. (December 13, 2014).

Webinar Technical Training/Update, "Tax Issues Update: Is Everything a Change in Accounting Method?," Thomson Reuters. (December 11, 2014).

Webinar Technical Update/Training, "Accounting (and Tax Issues) for Farm and Ranch," Thomson Reuters. (December 11, 2014).

Workshop, "Fall 2014 Gregg Master Teacher Symposium." (November 14, 2014).

Research Presentation, "by "Woods Award Winner" - Li Feng," McCoy CBA. (September 19, 2014).

Technical Update/Training, "ASC 740 Accounting for Income Taxes (FASB &TAX) Quarterly Update," Grant Thornton. (September 17, 2014).

Technical Update/Training, "ASU 2014-09 (IFRS 15) New Global Revenue Standard," Grant Thornton. (July 2014).

Technical Update/Training, "Tax Amendments for Tax Year 2014 - Mexico (for Multinationals and Investors)," Grant Thornton. (July 29, 2014).

Conference Attendance, "Advance Healthcare - Accounting Issues (IFRS/FASB/TAX)," Texas Society of CPAs and Texas Medical Association, San Antonio, TX. (July 21, 2014 - July 22, 2014).

Technical Update/Training, "Border Crossings - Changing Transfer Pricing Documentation (Tax Issues)," EY. (June 26, 2014).

Technical Update/Training, "Benefits from China's VAT Pilot Reform," EY. (June 17, 2014).

Research Presentation by Dr. Rasim Musal, "Estimating and Modeling Fraud in Medical Programs; A Bayesian and Information Theoretic Framework," McCoy CBA. (March 28, 2014).

Conference Attendance, "ATA Mid-Year Conference," American Taxation Association, San Antonio. (February 21, 2014 - February 22, 2014).

Conference Attendance, "Accounting Educators Conference," Texas Society CPAs. (October 2013).

Workshop, "Research Grant Presentations," McCoy CBA. (October 25, 2013).

Seminar, "Estate & Gift Taxation," Texas Society of CPAs - Austin Chapter. (October 23, 2013).

Conference Attendance, "ATA Mid-Year Conference - San Diego," American Taxation Association. (February 21, 2013 - February 23, 2013).

Conference Attendance, "Accounting Educators Conference," Texas Society of CPAs. (October 2012).

Workshop, "Research Grant Presentations," McCoy CBA. (September 24, 2012).

Conference Attendance, "American Accounting Association Annual Meeting," National Harbor (Washington DC), MD. (August 6, 2012 - August 8, 2012).

Workshop, "Family Law Workshop," Texas State University - Professional Development Program. (August 2, 2012).

Workshop, "Refresher on Correlation & Regression by Dr. Brian Miller," Texas State University. (May 21, 2012).

Additional Comments: led by Dr. Brian Miller

Technical Update/Training, "Divorce - Biggest Financial Transaction in Client's Life," Texas Society of CPAs - Austin Chapter. (April 27, 2012).

Conference Attendance, "ATA Mid-Year Conference," American Taxation Association, New Orleans. (February 2012).

Technical Update/Training, "2012 Federal Tax Update," Institute of Management Accountants. (February 2012).

Workshop, "How to Make Tenure," Texas State University - Christian Faculty Forum. (February 2012).

Workshop, "Checkpoint- Training for University Students and Professors," Thomson Reuters. (November 2011).

Workshop, "How to Develop a Faculty-led Study Abroad Program," Texas State University - Academic Development & Assessment. (November 2011).

Conference Attendance, "Accounting Educators Conference," Texas Society of CPAs, Austin. (October 2011).

Technical Update/Training, "Fraud and Fraudsters in Organizations," Institute of Management Accountants, Austin. (October 2011).

Technical Update/Training, "PCAOB Update," American Society of Women Accountants, San Antonio. (September 2011).

Technical Update/Training, "US Congressional (Financial) Update," Institute of Management Accountants, Austin. (September 2011).

Workshop, "Research Grant Presentations," McCoy CBA. (September 2011).

Conference Attendance, "AAA Annual Meeting," American Accounting Association, Denver. (August 2011).

Conference Attendance, "Texas Accounting Educators Seminar," Texas State Board of Public Accountancy, Austin. (August 2011).

Technical Update/Training, "Mid-Year Federal Tax Update," Texas Society of CPAs - Austin Chapter, Austin. (August 2011).

Technical Update/Training, "International Taxation," Texas Society of CPAs - Austin Chapter, Austin. (July 2011).

Workshop, "EEO Training for Employee: Non-supervisors," Texas State University. (April 2011).

Workshop, "Texas State University - Distinguished Guest Speaker," Accounting Department. (April 2011).
Additional Comments: Dr. Carolyn Callahan (U. of Memphis)

Conference Attendance, "ATA Mid-Year Conference," American Taxation Association, Washington DC. (March 2011).

Attendee, "Research Presentation," The University of Texas at San Antonio. (February 2011).

Conference Attendance, "New Faculty Consortium," American Accounting Association, Leesburg, VA. (February 2011).

Attendee, "Research Presentation," The University of Texas at San Antonio. (November 2010).

Seminar, "Texas State University - Distinguished Guest Speaker," Accounting Department. (November 2010).
Additional Comments: PResentation by Dr. Cherly Linthicum of The University of Texas at San Antonio

Conference Attendance, "Accounting Educators Conference," Texas Society of CPA's. (October 2010).

Workshop, "Tax Educators' Focus Group," McGraw-Hill, Chicago, IL. (October 2010).

Workshop, "Research Grant Presentations," McCoy CBA. (September 2010).

Conference Attendance, "AAA Annual Meeting," American Accounting Association, San Francisco. (August 2010).

Conference Attendance, "Annual Conference on Teaching and Learning in Accounting," American Accounting Association, San Francisco. (August 2010).

Attendee, "Research Presentation," The University of Texas at San Antonio. (April 2010).

Conference Attendance, "Southeast Regional Conference," American Accounting Association, Mobile, AL. (April 2010).

Conference Attendance, "Program for Teaching and Learning Excellence," Texas State University. (September 2009 - April 2010).
Additional Comments: New Tenure-track faculty program (monthly sessions)

Conference Attendance, "ATA Doctorial Consortium," American Taxation Association. (March 2010).
Additional Comments: Served on Program Committee

Conference Attendance, "ATA Mid-Year Conference," American Taxation Association, Denver, CO. (March 2010).

Conference Attendance, "Southwest Regional," American Accounting Association. (March 2010).

Seminar, McCoy CBA - Forum on Ethics in Curriculum. (2009).

Conference Attendance, "Annual Tax Conference," Texas Society of CPAs - Austin Chapter. (November 2009).

Conference Attendance, "Accounting Educators Conference," Texas Society of CPA's, Austin. (October 2009).

Workshop, "TRACS Training," Texas State University. (September 2009).

Conference Attendance, "American Accounting Association Annual Meeting," New York, NY. (August 2009).

Conference Attendance, "ATA Mid-Year Conference," Orlando, FL. (February 2009).

"Southwest Regional," American Accounting Association. (February 2009).

Conference Attendance, "American Accounting Association Annual Meeting," Anaheim, CA. (August 2008).

"Southwest Regional," American Accounting Association, Houston, TX. (March 2008).

Conference Attendance, "American Accounting Association Annual Meeting," Chicago, IL. (August 2007).

Conference Attendance, "Southwest Regional," American Accounting Association, San Antonio. TX. (February 2007).

Conference Attendance, "American Accounting Association Annual Meeting," Washington D.C. (August 2006).

Workshop, "Fulbright Faculty Workshop," Alamo Community Colleges - St Philip's College, San Antonio. (April 2005).

Seminar, "IRS Criminal Investigation," Texas Society of CPAs - San Antonio Chapter. (March 2005).

IV. SERVICE

A. Institutional

1. University:

Faculty Advisor, N-Site (formerly Business Careers High School (San Antonio) Presentations & Visit. (2015 - Present).

University Mentor, University/College Graduation. (December 2021).

Participant, Altek Library Annual Orientation and Update. (October 20, 2021).

Faculty Advisor & C0-Coordinator, NSite- Careers High School Live Zoom presentation (Accounting Club's 19th yr annual event). (March 3, 2021).

Faculty Advisor, 2019 Business Careers High School Visit & Presentations. (September 24, 2019).

Additional Comments: BCHS is a diversified, magnet HS within the Northside ISD system (San Antonio) This was our 18th year to have Accounting Students present info on Texas State and attending college in general to approximately 250 students and their faculty. (An all day event)

Faculty Advisor, 2018 Business Careers High School - Presentation at HS. (September 26, 2018).

Department Representative, Alkek Annual Library Orientation/Update Presentation. (September 19, 2018).

Participant, Universities Libraries Collection Orientation. (October 12, 2017).

Faculty Advisor, Business Careers High School College Day Event/Holmes HS. (September 25, 2017).

Faculty Advisor, Holmes High School Visit (in San Antonio). (September 21, 2016).

Student Org Advisor (Professional Org), Holmes HS - Recruiting; Annual Visit to Texas State University. (March 4, 2016).

Student Org Advisor (Professional Org), Holmes HS - Recruiting: Accounting Club visit to Holmes HS San Antonio. (September 2015).

Faculty Representative, BobCat Days. (April 2015).

Student Org Advisor (Professional Org), Holmes HS - Recruiting; Annual Visit to Texas State University. (January 2015).

Student Org Advisor (Professional Org), Holmes HS - Recruiting; Accounting Club visit to Holmes HS San Antonio. (September 10, 2014).

Faculty Representative, Bobcat Preview - Fall 2014. (August 20, 2014).

Faculty Representative, Bobcat Days. (April 2014).

Student Org Advisor (Professional Org), Holmes HS - Recruiting; Annual Visit to Texas State University. (January 2014).

Student Org Advisor (Professional Org), Holmes HS - Recruiting; Accounting Club visit to Holmes HS San Antonio. (September 2013).

Co-Site Coordinator, IRS VITA Program for Texas State University Community. (November 2012 - April 2013).

Faculty Representative, Bobcat Days. (March 2013).

Faculty Representative, Holmes HS - Recruiting; Annual Visit to Texas State University. (January 2013).

2. College:

Member, Ethics & Diversity Committee. (August 2020 - January 20, 2022).

Faculty Mentor, Hooding Ceremony. (December 2021).

Organizing Committee Member, 12th Annual Roundtable - (theme) Compassion and 360 Meet & Engage Event. (October 19, 2021).

Member, McCoy College Governance Committee. (August 2018 - August 2021).

Faculty Advisor and Co-Coordinator, NSite - Careers High School Live Zoom presentation (Accounting Club's 19th year annual visit). (March 3, 2021).

Additional Comments: Dr Conn and I ,along with students from the Accounting Club, presented two one-hour live zoom presentations which was available to approximately 300 students and faculty at NSite High School (a magnet school at NSID in San Antonio.) This was the 18th year for the Accounting Club to 'visit' the HS and share information regarding college and college life and TXST! The presentation was prepared by myself and Dr Conn.

Deputy Director, Texas Wine and Spirits Alliance - McCoy CBA. (January 15, 2017 - May 30, 2020).

Outside Faculty Member, CIS Job Search Committee. (August 2018 - May 2019).

Faculty Mentor, McCoy CBA Graduation. (December 15, 2018).

Wine Region Visitations - over 45 one-on-one visits. (June 2018 - October 2018).

Committee Member, McCoy CBA Research Enhancement Committee/Program. (August 2012 - August 2018).

Faculty Mentor, McCoy College Graduation. (May 12, 2018).

University Mentor, McCoy Graduate Hooding. (December 15, 2017).

Organizer, Business Career High School Visit (cancelled that day by BCHS). (February 23, 2017).

Faculty Mentor, McCoy CBA Hooding Ceremony. (December 17, 2016).

Faculty Mentor, Beta Gamma Sigma Recognition Ceremony. (November 17, 2016).

Committee Member, McCoy CBA Impact of Research Task Force. (August 24, 2014 - May 2015).

Faculty Mentor, McCoy CBA Hooding and Graduation Ceremonies. (May 15, 2015).

Faculty Representative, McCoy CBA Awards Day & BGS Recognition Ceremony. (April 17, 2015).

Faculty Representative, McCoy CBA Graduate Hooding Ceremony. (December 12, 2014).

Faculty Representative, Beta Gamma Sigma Recognition Ceremony. (October 27, 2014).

Faculty Representative, Undergraduate Marshall McCoy CBA Graduation Ceremony. (May 8, 2014).

Faculty Representative, Hooding for Derek Pierce McCoy CBA Graduate Hooding Ceremony. (May 7, 2014).

Faculty Representative, McCoy CBA Awards Ceremony & Beta Gamma Sigma Induction. (April 25, 2014).

Faculty Representative, McCoy CBA Graduate Hooding. (December 13, 2013).

Faculty Representative, Distinguished Alumni McCoy CBA Reception - Tom Roddy. (October 25, 2013).

Faculty Representative, McCoy CBA Graduate Hooding. (May 2013).

Faculty Representative, McCoy CBA Awards Ceremony & Beta Gamma Sigma Induction. (April 12, 2013).

Faculty Mentor, McCoy CBA Commencement Ceremony. (December 14, 2012).

Faculty Representative, McCoy CBA Graduate Hooding and Commencement Ceremonies. (May 2012).

Faculty Representative, McCoy CBA Graduate Hooding and Commencement Ceremonies. (August 2011).

Committee Member, McCoy CBA Impact of Research Task Force Committee. (October 2010 - April 2011).

Faculty Representative, McCoy CBA Commencement Ceremony. (August 2010).

3. Department/School:

Committee Member, Library Advisory Committee. (May 2015 - Present).

Committee Member, Merit and Evaluation Committee. (August 23, 2014 - Present).

Committee Member, Student Development Committee. (June 6, 2013 - Present).

Chair, Accounting Department Governance Committee. (August 2018 - August 2021).

Faculty Mentor, Fall Joint Accounting Dept. Student Organizations. (August 26, 2021).

Faculty Mentor, Business Leadership Week - CPA Evolution by Bill Reeb. (April 20, 2021).

Faculty Mentor, Spring Joint Meeting Accounting Dept. Student Organizations. (January 2021).

Faculty Mentor, Spring Showcase. (January 2021).

Committee Member, Center for Professional Accountancy Committee. (August 25, 2016 - 2020).

Member, IMA Competition Team Selection Committee. (December 2, 2020).

University Mentor, Spring Showcase (Accounting Firms & Students). (January 28, 2020).

University Mentor, Meet the Firms. (September 20, 2019).

University Mentor, Showcase Event Night - room host (RSM). (February 7, 2019).

Faculty Representative, Grant Thornton Dinner for Faculty Representatives. (December 10, 2018).

Faculty Mentor, Meet the Firms and Recruiter Luncheon. (September 2018).

Committee Member, Research Enhancement Program. (August 2012 - August 2018).

Additional Comments: For Fall 2016, reviewed, discussed, and voted on the largest number of proposals ever received by the committee.

Chair, Accounting Department Family Giving Campaign - 100%. (August 2017 - May 2018).

Faculty Mentor, Accounting Excellent Awards Banquet. (April 19, 2018).

Discussant/Advisor, REP (Grant) Open Door Event. (October 17, 2017).

Faculty Mentor, Meet the Firms Job Fair. (September 22, 2017).

Faculty Advisor, Accounting Club (co-advisor with K. Martin; over 25 meetings & events each year). (June 6, 2013 - May 15, 2017).

Faculty Mentor, Accounting Stars Event. (December 1, 2016).

Faculty Mentor, Mock Interviewing Event. (November 10, 2016).

Faculty Mentor, "Lifting As We Climb" NABA Meeting - Michelle Jenkins, speaker. (October 27, 2016).

Faculty Mentor, Meet the Firms. (October 7, 2016).

Faculty Mentor, Alumni Panel Presentation. (October 6, 2016).

Faculty Advisor, Accounting Club - All You Need to Know About Accounting. (September 8, 2016).

Faculty Mentor, Deborah Kissire, Retired EY VC and RM Partner. (September 8, 2016).

Faculty Mentor, BAP Team Review for Regional Competition. (March 3, 2016).

Faculty Representative, Beta Alpha Psi Kappa Eta Induction Ceremony. (December 6, 2014).

Faculty Representative, Accounting Department Advisory Board Meeting. (November 7, 2014).

Committee Member, Committee to Implement CPA Exam Pass Rate Task Force Recommendations. (August 2013 - May 2014).

Faculty Representative, Beta Alpha Psi Kappa Eta Chapter Induction Ceremony. (April 23, 2014).

Committee Member, Department Faculty Search Committee. (May 2013 - December 2013).

Faculty Representative, Beta Alpha Psi Kappa Eta Chapter Induction Ceremony. (April 30, 2013).

Faculty Representative, Accounting Club - over 25 meetings & events during the year. (August 2012 - April 2013).

Faculty Representative, Accounting Department Advisory Board Meeting. (November 9, 2012).

Faculty Representative, Accounting Club - over 25 meetings & events during the year. (August 2011 - May 2012).

Committee Member, Research/Journal Quality Committee. (December 2010 - May 2011).

Faculty, Accounting Club - over 25 meetings & events during the year. (August 2010 - May 2011).

Faculty Representative, Accounting Department Advisory Board Luncheon. (2010).

Faculty Representative, Accounting Club - over 25 meetings & events during the year. (August 2009 - May 2010).

B. Professional:

Reviewer, Ad Hoc Reviewer, Journal of Legal Tax Research - ATA. (January 5, 2017 - Present).

Additional Comments: Invited by the Senior Editor.

Reviewer / Referee, Annual Texas FBLA Competitive Events Conference - Judge. (March 17, 2021 - March 23, 2021).

Guest Speaker - Enterprenurial Competition Class, NSite - Northside School of Innovation, Technology, and Entrepreneurialship, San Antonio, TX. (March 9, 2020).

Additional Comments: Invited Speaker - Topic: Entrepreneurial Startup and Financial Reporting Needs

Dept of Accounting Representative, BKD - San Antonio Open House & Ribbon Cutting, San Antonio, TX. (February 6, 2020).

Reviewer / Referee, Cambridge Business Publishing - Accounting Research. (December 1, 2017 - June 2019).

Additional Comments: Asked for my assistance several times in Fall 2017 and then 'formal invitation' issued in person when a publishing representative and the Editor-in-Chief/President visited my office in Jan 2018.

Judge - Small Business Management Plan Section, FBLA-PBL National Leadership Conference, San Antonio, TX. (June 25, 2019).

Interaction with Industry, Institute for Professionals in Taxation, Guest Spearker Trisha Fortune, Partner from Ryan LLC. (April 24, 2019).

Coordinator / Organizer, Tax Manager from RSM - guest speaker (two sections). (April 22, 2019).

Coordinator / Organizer, Thermon Inc Guest Speaker ACC 5350 (2 sections). (November 20, 2018).

Deputy Director, Texas Wine And Spirits Alliance. McCoy CBA, Visited over 45 area wineries one on one. (June 2018 - October 2018).

Interact with Industry, Visited Ridout and Barnett CPA (San Antonio). (August 2018).

Committee Member, American Taxation Association- New Faculty Concerns. (August 5, 2015 - May 2018).

Coordinator / Organizer, Thermon Inc Guest Speaker ACC 5350 MM2. (April 2018).

Coordinator / Organizer, Tax Manager Guest Speaker for ACC 4328. (April 26, 2018).

Coordinator / Organizer, Thermon Inc Guest Speaker ACC 5350 MM1. (February 2018).

Coordinator / Organizer, Tax Manager from RSM - guest speaker. (November 2017).

Coordinator / Organizer, Thermon Holdings, CFO Mike Vint speaker. (November 2017).

Additional Comments: Mr Vint spoke to both of my ACC 5350 classes - discussed research avenues and directives for a recent merger, among other going public topics

Faculty Representative, Brian Wong - McCoy College Honored Alumni Dinner & Meeting. (August 31, 2017).

Interaction with Industry, RSM Tax Partner Jon Adenolfi speaker to ACC 4328. (November 10, 2016).

Interaction with Industry, Thermon Holdings Group, CFO Mike Vint speaker for BOTH Sections of ACC 5315. (October 27, 2016).

Interaction with Industry, Grant Thornton sponsored dinner with partners. (October 25, 2016).

Interaction with Industry, BKD sponsored lunch with Partners. (October 19, 2016).

Interaction with Industry, Ann Tallent, EY Partner Guest Speaker to BOTH SECTIONS of ACC 5315 Fall Semester. (September 29, 2016).

Interaction with Industry, RSM Tax Partner from Houston. (April 17, 2016).

Interaction with Industry, Anna Tallent, Partner EY - San Antonio speaking to ACC 5315. (March 10, 2016).

Interaction with Industry, Thermon Group Holdings, Inc; hosted Corporate Controller Mike Vint as guest speaker for ACC 5315. (February 25, 2016).

Interaction with Industry, Thermon Group Holdings, Inc; hosted Corporate Controller Mike Vint as guest speaker for ACC 5315. (November 2015).

Attendee, Meeting, PwC Invitational Tax & Accounting Symposium. (August 6, 2015 - August 7, 2015).

Interaction with Industry, Thermon Group Holdings, Inc; hosted Corporate Controller Mike Vint as guest speaker for BOTH sections of ACC 5315. (April 2015).

Interaction with Industry, Thermon Group Holdings, Inc; hosted Corporate Controller Mike Vint as guest speaker for BOTH sections of ACC 5315. (November 13, 2014).

Committee Member, American Accounting Association - Notable & Distinguished Contributions to Accounting Literature Award Screening Committee. (February 2014 - August 2014).

Additional Comments: Reviewed a total of 14 manuscripts and nomination letters for AAA Notable and Distinguished Contributions to Accounting Literture Award.

Interaction with Industry, Texas Society CPAs/TX Medical Asso. Advanced Health Conference, San Antonio. (July 21, 2014 - July 22, 2014).

Interaction with Industry, Padgett CPA - Annual Appreciation Event, Austin, TX. (May 22, 2014).

Interaction with Industry, Thermon Group Holdings, Inc; hosted Corporate Controller Mike Vint as guest speaker for ACC 5315. (April 8, 2014).

Committee Member, American Tax Association - Mid-Year Conference Planning (for 2014 Meeting in San Antonio). (August 2012 - March 2014).

Ongoing Research Sessions - Moderator, ATA Mid-Year Conference, San Antonio, TX. (February 21, 2014 - February 22, 2014).

Interaction with Industry, Thermon Manufacturing - Mike Vint, Controller; hosted as guest speaker to ACC 5315 classes. (November 7, 2013).

Committee Member, American Accounting Association - Governance Committee. (August 2012 - August 2013).

Committee Member, American Taxation Association/Deloitte Teaching Innovations Award Committee. (August 2012 - August 2013).

Committee Member, Boy Scouts of America - Financial Review Meeting, Austin, Texas. (July 23, 2013).

Conference-Related, American Taxation Association Mid-Year Conference - San Diego. (February 2013).

Reviewer, Journal Article, Advances in Accounting (Journal). (November 2012).

Interaction with Industry, BDO Tax Partner - hosted as guest speaker for ACC 4328. (November 7, 2012).

Committee Member, American Taxation Association - New Faculty Concerns. (August 2011 - August 2012).

Conference-Related, American Accounting Association Annual Meeting, National Harbor, MD. (August 8, 2012).

Faculty Representative, McCoy CBA Business Leadership/Accounting Club. (March 2012).

Additional Comments: Kathie Schwerdtfeger, Deloitte & Touche.

Committee Member, American Taxation Association Mid-Year New Faculty Breakfast. (February 2012).

Interaction with Industry, IMA Technical Meeting. (February 2012).

Reviewer, Journal Article, Advances in Accounting (Journal). (January 2012).

Attendee, Meeting, University of Texas at San Antonio Research Presentation. (October 2011).

Interaction with Industry, IMA Technical Meeting. (October 2011).

Interaction with Industry, Texas State CPA Accounting Educators Conference, Austin. (October 2011).

Session Chair, Accounting Education Foundation - Conference, Austin. (October 2011).

Interaction with Industry, American Society of Women Accountants Technical Meeting. (September 2011).

Interaction with Industry, IMA Technical Meeting. (September 2011).

Legal Tax Research Session Moderator, American Accounting Association, Denver. (August 2011).

Committee Member, American Taxation Association Annual Program. (August 2010 - August 2011).

Attendee, Meeting, University of Texas at San Antonio Research Presentation. (February 2011).

Attendee, Meeting, University of Texas at San Antonio Research Presentation. (November 2010).

Attendee, Meeting, McGraw-Hill Tax Educators Forum. (October 2010).

Interaction with Industry, Texas Society CPAs Educators Conference. (October 2010).

Conference-Related, AAA Annual Meeting. (August 2010).

Attendee, Meeting, University of Texas at San Antonio Research Presentation. (April 2010).

Conference-Related, Southeast Regional American Accounting Association. (April 2010).

Committee Member, American Taxation Association - PhD Consortium, Denver. (July 2009 - March 2010).
Additional Comments: Program Committee member for 2010 PhD Conference.

Committee Member, Texas Society of CPAs - San Antonio Chapter - Education Committee. (2005 - 2009).

Conference-Related, American Taxation Association Mid-Year Conference. (February 2008).

Conference-Related, American Accounting Association. (August 2007).

Conference-Related, American Accounting Association. (August 2006).

C. Community:

Finalist Judge and Prelim Judge for Two Categories -Business Plans & Business Financial Plans, Future Business Leaders of America - Regional Competition, TX. (March 13, 2021 - March 22, 2021).

Additional Comments: Served as a prelim and finalist judge for a total of 4 sections; two in each of the following categories: 1) Business Plan 2) Business Financial Plan
Judged a total of 22 projects/presentations.

Committee Member, Boy Scouts of America - Capitol Area (regional); Accounting Committee. (January 15, 2013 - August 15, 2015).

Kiwanis Representative, Key Club at Carrol High School - Crosstown Kiwanis. (2001 - 2002).

Official Host for 10 days; five youth and two coaches, Korean (Youth) Sailing Team for World Optimist Sailing Competition, Corpus Christi. (July 2002).

Fredericksburg Band Boosters - various positions and event volunteer. (1992 - 1997).

Brownie/Girl Scout Leader - Dearborn Michigan. (1987 - 1990).

Board Member, Past Member of the Board of Directors of the following: YWCA - Corpus Christi, Food Bank of Corpus Christi, Paisano Girl Scout Council - Corpus Christi, Leadership Corpus Christi Alumni. (1979 - 1984).

D. Organization Memberships:

AICPA and various sections. (2011 - Present).

Institute of Management Accountants (IMA). (2011 - Present).

Beta Gamma Sigma. (2010 - Present).

American Accounting Association. (2005 - Present).

American Taxation Association. (2005 - Present).
Additional Comments: 2010 PhD Seminar Program Committee member; 2011 Mid-Year Meeting Program Committee member

Texas Society of CPAs. (2005 - Present).

E. Service Honors and Awards:

Award / Honor Recipient: IRS VITA Site Sponsor Community Leadership Certificate of Appreciation.
April 2013

Award / Honor Recipient: Advisor Award - Marketing Club (multi-business disciplined student club with other 200 members), Del Mar College.
2004