

SHARON S. LASSAR, PH.D., CPA (FLORIDA)

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NATIONAL AWARDS:

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
Major - Taxation Minor - Econometrics

M.S. **Bentley University**, Waltham, Massachusetts, May 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, 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

PROFESSIONAL EXPERIENCE:

Rand Corporation, Santa Monica, California
1985 - 1986; Research Assistant to Dr. Lee Lillard, Econometrician.

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

TEACHING EXPERIENCE:

Traditional Programs:

Principles of Taxation and Advanced Taxation, the undergraduate tax sequence, **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, **IUM** (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:

Accounting Scholars Development Program, July 1- August 4, 2011, University of Denver. Launched a community college outreach program with sponsorship by the AICPA Foundation, Deloitte, E&Y, KPMG and PwC that drew 35 minority students from 30 colleges in 13 states to learn about accounting careers and the process of transferring to a four-year institution.

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.

Continuing Education:

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

SCHOLARSHIP:

Refereed Journal Articles:

1. Sonnier, Blaise M., Sharon S. Lassar and Walfried M. Lassar (2011), "An Examination of the Influence of Audit Firm Size and Industry Specialization on Juror Evaluation of Liability", *Journal of Forensic and Investigative Accounting*, (forthcoming).
2. 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.
3. 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.
4. 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.
5. 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.
6. 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.
7. 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 .
8. 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.
9. 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.
10. 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.

11. 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.
12. 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.
13. 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.
14. 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.
15. 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.
16. 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.
17. 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.
18. 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.
19. 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.**
20. 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.
21. Lassar, Sharon S. and J. Scott Vermaas (1997), "Brown Group Revisited", *International Tax Journal*, Vol. 23, No. 4 (Fall 1997) 76-98.
22. 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.
23. 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.

24. 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:

25. 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:

26. 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.)
27. 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.)
28. 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.)
29. 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.)
30. 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.)
31. 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.)
32. 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.)
33. 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.)
34. 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.)
35. 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.)

Competitive Grants:

36. **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.
37. **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.
38. **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.
39. **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 Luttmann. Awarded in March 1990. Final report submitted June 1991.

Non-Refereed Works:

40. 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.
41. 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.
42. 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.
43. Lassar, Sharon S. (1998), "Tax Advisor-Client Privilege: A Question of Turf?" *Tax Notes*, Vol. 78, No. 11 (March 16) 1435-1436.
44. 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.
45. 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.
46. 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

"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 FIUAA, 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

“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 videos! <http://www.youtube.com/watch?v=1AIPJ7ZuC9w>
http://www.youtube.com/watch?v=rmcHFIBId_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.
 “Book Commemorates Minority CPAs’ Achievements”, *Florida CPA Today*, November/December 2009, pg. 32. Direct link not available. Click on NovDec 2009 at
<http://www.ficpa.org/Content/Members/Tools/Publications/FCT/Archives.aspx>
 “Congratulations to the 2009 Scholarship Recipients!” *ALPFA Impact*, Fall 2009, with photo, page 30.
 “MSRP Double the Fun, Double the Opportunities”, by Brenda Hubbard, *Florida CPA Today*, September/October 2009, with photo, pg. 25-27. Click on Sept/Oct 2009 at:
<http://www.ficpa.org/Content/Members/Tools/Publications/FCT/Archives.aspx>
 “Clients want help cutting costs, lawyers and accountants say”, by Oscar Pedro Musibay, *South Florida Business Journal*, with photo, August 21, 2009, page 21.
<http://digital.bizjournals.com/Launch.aspx?referral=other&pnum=&refresh=a14P03Zs5d0F&EID=a61f9e4f-3a96-4cb6-ae85-52cb5a90bed4&skip=>
 “Miami-Dade’s financially-strapped public hospital system to ask for more tax money”, by John Dorschner, *The Miami Herald* lead front page story, Sunday, July 19, 2009.
<http://www.miamiherald.com/business/story/1148306.html>
 “Executive Committee Charts the Course”, *Florida CPA Today*, July/August 2009, with photo, pg. 32.
http://www.ficpa.org/fs_ficpa/publicfiles/member/fct/2009/JulyAug.pdf
 “Financial Fitness Friday Volunteers Assist More Than 200 Floridians”, *Florida CPA Today*, January/February 2009, pg. 20
http://www.ficpa.org/fs_ficpa/publicfiles/member/fct/2009/JanFeb.pdf
 “CPAs Available to Answer Questions amid Economic Turmoil”, *Reuters*, November 10, 2008
 “IRS Criminal Investigation” – Interview and program footage on Channel 6 News – October 2008
 “Business school adopts program”, <http://www.beaconnewspaper.com/articles/business-school-adopts-program>
 Dade County Public TV – Interview on National Stimulus Day – March 29, 2008
 In studio interview on WMBX-FM radio at 102.3 regarding Financial Literacy for America Saves Week, March 12, 2007.
 Numerous articles on FIU News <http://biznews.fiu.edu/tag/sharon-lassar/>

SERVICE TO THE COMMUNITY AND CPA PROFESSION – Since 2000

American Institute of Certified Public Accountants	
Minority Issues Committee member	2008-2011
Tax Practice Responsibilities Committee member	2004-2007
Association of Latino Professionals in Finance and Accounting	
National Corporate Advisory Board member	2007-Present
Chair, Woman of ALPFA Award Committee	2011
Chair, Graduate Expansion Committee	2011
Colorado Society of Certified Public Accountants	
Member of Accounting Careers Committee	2010-2011
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, train and supervise volunteer preparers	2004-2006
The German School of South Florida, Inc. , Treasurer	1996-2005

ACADEMIC SERVICE:

University of Denver	
Daniels Academic Council, Member	2010-2012
Daniels Strategic Hiring Committee, Chairperson	2011-2012

Daniels Exclusive Excellence Committee, Member	2011-2012
Daniels Strategic Hiring Committee, Member	2010-2011
American Taxation Association	
External Relations Committee, Chair	2011-2012
Tax Policy Committee, Member	2011-2012
External Relations Committee Member	2008-2010
Teaching Innovations Committee member	2005-2009
Tax Syllabus Exchange Task Force Chairperson	2006-2007
Graduate Tax Education Committee Chairperson	2005-2006
Manuscript Award Committee member	2003-2004
Southeast Region Coordinator	2001-2002
Teaching Resources Committee	2000-2001
JATA Conference Committee invited member	1998-1999
Chairperson of International Taxation Committee	1998-1999
International Taxation Committee member	1994-1997
Manuscript Award Committee member	1992-1993
Dissertation Awards Committee member	1990-1991
Publications Committee member	1991-1992
Reviewer of Educational Materials	
National Society of Accountants – Review of ACAT Preparatory Course	2006
"Taxation for Decision Makers" by Dennis-Escoffier and Fortin	2002
Several other smaller projects over career	
ANet, The International Accounting Network	
Founder and moderator of ATax-L listserv	
The first listserv for Accounting professors	1994-2000
<i>Journal of the American Taxation Association</i>	
Editorial board	1991-1995
Frequent reviewer	1995-2004
American Accounting Association	
Mid-Atlantic Region , discussant for <i>Tax Research</i> session	1995
Southeast Region , session chair, AV coordinator and co-host.	1995
Western Region , moderator/discussant	1990
National Meeting , referee and discussant	1990
Reviewer of Peer Research	
<i>Journal of Business Research</i>	1995
<i>Journal of Accounting and Economics</i>	1989
<i>Accounting Horizons</i>	1990
National Tax Association Served on various committees	1992-1996
Florida International University	
Administrative Council – College of Business	2007-2010
Faculty Director, MACC and EMST programs	2009-2010
Assurance of Learning Chair for EMST	2009-2010
Selection Committee – Kauffman Professors	2010

Invited judge for J&J case competition	2008, 2009
Search and Screen Committee – Dean, College of Business	2008-2009
Search and Screen Committee - School of Accounting	2006-2007
Search and Screen Committee – Department of Finance	2006-2007
External Relations Committee – College of Business	2007-2010
Student Managed Investment Fund – Task Force to create fund	2008

Florida Atlantic University

School of Accounting Curriculum Committee member	2000-2006
Accounting Student Association - Davie Faculty Advisor	2000-2006
International Business Executive Advisory Board member	1995-1999
Chairperson of International Business C.E. Task Force	1997-1999
Undergraduate International Business Task Force member	1996-1997
Graduate International Business Task Force member	1997-1999
COB Faculty Development Committee member	1998-2000
Broward Faculty Senate Vice President	1996-1997
Planning Committee member	1995-1997
Broward Faculty Senator	1992-2003
United Way Campaign Facilitator (COB - Broward)	1995-1999
WISE (web site) developer	1996-1998

University of Arizona

Graduate Studies Committee	1990-1992
Library committees	1991-1992

PRO BONO SPEAKING ENGAGEMENTS (including CPE programs since 2000):

AICPA & CPA/SEA Interchange 2011, Panelist	
Diversity: How Important Is It? Should you Designate Resources	
Toward Student Outreach Initiatives?	July 2011
DU 10 th Annual Diversity Summit “Diversity as a Business Imperative”	
Panelist with representatives of Deloitte	May 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
Accounting Program Leadership Group, Panel member on “You’re Different”	February 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 2010
Muriel F. Siebert Foundation – Miami, FL	November 2009
Invited Presenter – Making Sense of Dollars and Cents	
Workshop for Miami Dade County Public Schools Teachers	
FICPA Practice Management Conference – Fort Lauderdale, FL	
A&A Emerging Issues Session Leader	September 2009
ALPFA National Convention – Boston, MA	August 2009
Invited Panelist - The Role of Leading Universities in Forming the	
Next Generation of Latino Professionals, representing FIU with	

representatives of Harvard, Brandeis & Northeastern Universities.	
FIUAA / BAP CPE Program – Peer Review in Florida	June 2009
AICPA Student Leadership Conference – Atlanta, GA	May 2009
Invited Presenter of How to Pass the CPA Exam	
FICPA Broward Chapter – Accounting & International Business	May 2009
Miami Commission Meeting – Audit Advisory Board Report	May 2009
American Taxation Association Midyear Meeting, Orlando	February 2009
Developing Assessment Tools for AOL – Invited Panelist	
FIUAA / BAP CPE Program - The Clarity Project	November 2008
FBLA So. Florida Officer’s Training – Careers in Accounting	September 2008
FIPCA Broward Chapter - IFRS Update	May 2008
FIU Honor’s Council – What’s Next? Forum	April 2008
FIU Alumni Conference – Invited moderator of Panel	March 2008
How Governance, Risk and Compliance Overlap. Managing the New Standards and Expectations	
FICPA – Tax Research	
Fort Lauderdale Accounting Show	September 2008
Orlando FabExpo	June 2007
Accounting Education Update	
FICPA Miami Downtown Chapter Meeting	October 2007
Construction Financial Management Association	November 2007
ITAM – Mexico City	September 2007
Cuban American CPAs Association	March 2007
Recent Developments of the FASB/IASB	
FICPA Gold Coast Chapter	October 2007
FIU Beta Alpha Psi Fall CPE program	November 2007
Accounting Changes & Error Corrections	
Insurance Accounting & Systems Association	April 2007
FIU Accounting Association Spring CPE Program	June 2007
FICPA Dade County Chapter May Meeting	May 2007
FICPA Broward Chapter – Tax Update	January 2007
Government Finance Officers and City Clerk Association	
Fringe Benefits Presentation for South Florida Chapter	January 2007
American Woman’s Society of CPAs	
Nationally Broadcasted Tax Update via Webcast	November 2006
California Society of CPAs – Tax Practice Responsibilities	
Annual Tax Update in Burbank and San Francisco	October 2006
FIU Accounting Association Fall CPE Program	
Non Attest Services for Attest Clients	October 2006
FICPA – Circular 230	
Orlando FabExpo	May 2006
Fort Lauderdale Show	September 2006
FICPA – Atlantic Chapter - Casualty Losses	December 2005
FAU – Beta Alpha Psi AICPA Interpretation 101-3	June 2005
AWSCPA – South Florida Chapter - Ethical Dilemmas in Accounting Practice	May 2005
FICPA – Broward Chapter Standards of Tax Practice	April 2005
FICPA – Professional Standards	
Broward & Atlantic Chapters	2004
FAU – Partnership Distributions	
Conference on Tax Aspects of a Closely-held Business	2004
FICPA – Broward Chapter - Licensing of Tax Preparers	2003

FICPA – Sarbanes-Oxley Act Dade, Broward and South Dade Chapters	2002
AWSCPA – South Florida Chapter -Developing Presentation Skills	2002
FICPA – SEC Update Broward and Gold Coast Chapters	2002
FICPA – Broward Chapter - Tax Updates	2000, 2001

PROFESSIONAL DEVELOPMENT ACTIVITIES (since 2000):

Leadership Development

Institute for Academic Leadership – Facilitator, Department Chairs Workshop	May 2010
Multicultural Relationships – Hyun & Associates	May 2010
FICPA Executive Committee Retreat, Tampa FL – Team Building	July 2009
Institute for Academic Leadership – Department Chairs Workshop II	June 2009
Women on the Move – 3-day Program by FIU’s Institute for Leadership	May 2009
Florida Office of Women in Higher Education Conference	November 2008
Institute for Academic Leadership – Department Chairs Workshop I	October 2008
PWC University, Princeton, NJ – Team Work Development	July 2008
FICPA Leadership Retreat, Reno, NV – Team Building	April 2008
Accounting Programs Leadership Group – Annual Development Seminar	2008-2011
AICPA Ambassador Training – Media relations	March 2007

Technical Development

PWC Annual Tax Symposium – invited participant	2007-2011
KPMG Faculty Symposium – invited participant	2009-2011
Deloitte Foundation/FSA Consortium	2007-2011
Webcasts offered by Big 4 Firms on Various Topics	1995-2011
Accounting Program Leadership Group Annual Seminar	2008-2011
American Accounting Association , most annual meetings	1988-2011
Participate in CPE and academic programs	
Ernst & Young Annual CPE Fair , Denver CO	2010
American Woman’s Society of CPAs – South Florida Chapter	
Participate in quarterly CPE meetings	2000-2010
Florida Institute of CPAs	
Vice President, Technical	2010
<i>Oversaw the Following Committees:</i>	
Accounting Principles and Auditing Standards	
Elder Care Services	
Estate and Financial Planning	
Federal Taxation	
Peer Review Acceptance	
Attend and often lead continuing professional education meetings.	1999-2010
Building Better Boards, participant	2008
American Taxation Association , mid-year meeting	1995-2009
Ernst & Young Tax Educator’s Symposium	2006-2009
University of Southern California Ph.D. alumni research symposium	2008
AACSB International	
Department Chairs Seminar	March 2008
Maintenance of Accreditation Seminar	August 2007

Ernst & Young's Learning & Networking Symposium	2007
International Fiscal Association/South Florida Multinational Tax Discussion Group	
Active member of this a group of approximately 40 multinational tax professionals	
The group held quarterly continuing education programs.	1996-2006
AICPA Conference Participation	
Spring Tax Division Meeting	2005
National Tax Workshop	2004 - 2006
Accredited Business Valuation Course	2004
AWSCPA/AWSA Joint Annual Conference participant	2005
Wallace-Lyon National Tax Workshop sponsored by NYU Law School	
Invited participant at this three-day annual conference	2004-2005
KPMG Tax Faculty Program	2003