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EDUCATION

Masters in Business Administration – Saint Mary’s University 2004

Professional Designation – Chartered Professional Accountant – Canadian Institute of Chartered Accountants, 1993

Bachelor of Commerce – Saint Mary’s University, 1991

EMPLOYMENT

2007- Present School of Business Administration, Dalhousie University
Senior Lecturer

2004, 2000 Mount Saint Vincent University, Part time Instructor

1995 -1997 Sobey School of Business, Saint Mary’s University
Lecturer

1995 -Present Consulting Practice, providing training services for CPA students; professional accounting training to a variety of entities

1991-1995 KPMG LLP
Senior Accountant – Assurance Services

- Planning and execution of assurance engagements
- Supervision of junior staff on assurance engagements

PUBLISHED ITEMS(NON-REFEREED)

Lease Case; Pension Case: Keiso, Weygandt, Young, Wiecek, Intermediate Accounting, Volume 1: 8th Canadian edition (2008): Wiley.

Case:Topsail Inc. Case 13-1 for Beechy and Conrod Intermediate Accounting, Volumes 1: 5th Canadian edition

Case: Melville Credit Union for Beechy and Conrod Intermediate Accounting, Volume 1: 6th Canadian edition

Case: Love your Pet for Beechy and Conrod Intermediate Accounting, Volume 1: 7th Canadian edition

AWARDS & HONOURS

- Teaching Excellence Award: Dalhousie University (2011) and (2015)
- Professor of the Year Award: Dalhousie University Commerce Society (2009)
- Professor of the Year Award, Saint Mary's University Commerce Society (1996)

UNIVERSITY TEACHING

Introductory Accounting – Part I

Have taught this required course numerous times with consistently strong teaching evaluations.

Introductory Accounting – Part II

Have taught this required course numerous times with consistently strong teaching evaluations.

Intermediate Accounting, Part I

Have taught this course numerous times with consistently strong teaching evaluations. A variety of teaching methods have been utilized including case-based instruction and tutorial style classes that focused on analyzing the financial statements of Canadian public companies.

Intermediate Accounting, Part II

Have taught this course numerous times with consistently strong teaching evaluations. A variety of teaching methods have been utilized including case-based instruction and tutorial style classes that focused on analyzing the financial statements of Canadian public companies.

Financial Statement Analysis

This course was taught for the first time in 2015 with very positive teaching evaluations. I used a variety of annual reports instead of a text book to depict a variety of current financial statement issues in real companies. I taught this course for a second time in 2016 with very positive student feedback.

Advanced Financial Accounting

Have taught this 4th year course several times, with very strong teaching evaluations. A heavy focus is placed on case analysis as a means of preparing students for professional accounting studies. Materials used in professional accounting programs are utilized to help facilitate student transition from university to professional studies. I have received significant feedback from students indicating their gratitude for enhanced preparation of professional studies as a result of this course.

External Auditing

I have taught this course several times. Course evaluations have been very positive with a 4.8 out of 5 for the most recent year. As with Advanced Financial Accounting, a heavy focus is on integrating the knowledge learned in the course with case situations to enhance the students' ability to prepare for the professional CPA program.

Masters of Public Administration-Accounting

Have taught this course both in the classroom and on line for the CFAME program several times. In 2007 I significantly revamped materials to be consistent with changes in accounting standards for PSAAB accounting in recent years.

PROFESSIONAL TEACHING

Atlantic School of Chartered Accountancy – Modules Lecturer, Facilitator/Course Development

Module 1:

This Module integrated content from the following areas: Performance Measurement and Reporting, Finance, Assurance, Taxation and General Strategy and Risk Management. The Module consisted of two weeks of face-to-face professional development sessions and tutorial-style sessions. Professional development sessions were lecture based and focus on the provision of technical skills. Tutorial sessions were very student-centered approach and were intended to assist students in applying technical material from the professional development sessions to cases. I also played a large part in the development of learning materials, including development of the final evaluation. I had been involved with Module 1 for several years.

Module 2,3 and 4

These module consisted of a 9-10-week distance component followed by a 3-day face-to-face workshop. These modules integrated content from the following areas: Performance Measurement and Reporting, Finance, Assurance, Taxation and Governance Strategy and Risk Management. Some additional complexities and content areas were integrated into these Modules. I had been a facilitator for these modules and assisted in the development of learning materials, including the final evaluations. I was actively involved with these modules for many years.

Atlantic School of Chartered Accountancy – Finalist Preparation Program

Finalist Preparation Program (FPP) was the final step before students of the Atlantic School of Chartered Accountancy (ASCA) wrote their Uniform Final Evaluation (UFE) under the legacy program. The UFE was a national exam which consisted of 13 hours of case simulations over 3 days. Students wrote practice simulations for which detailed feedback was provided by markers. I have been an instructor, marker and marking centre leader for FPP for many years when it was running.

UFE preparation sessions and CFE preparation sessions

I have led UFE preparation sessions for many national accounting firms in locations across Canada and continue to do so under the new CFE program. These firms include but are not limited to: KPMG LLP, Deloitte, Ernst and Young, Grant Thornton, and Price Waterhouse Coopers. I have also led preparation for many local accounting firms in Nova Scotia, including WBLI, AC Group, Collins Barrow, Lyle Tilley Davidson, Levy Casey Carter MacLean. I have also led UFE preparation sessions for the Office of the Auditor General in their Ottawa office.

Office of the Auditor General of Canada – UFE preparation course

In 2001, I developed a four day course for the Office of the Auditor General (OAG) . I have continued to facilitate this workshop on an annual basis for the OAG. This workshop included refinement of technical knowledge and case analysis skills. As part of the workshop, one-on-one sessions were also held with the students with individual marking of cases where personalized feedback and direction for improvement was provided.

Clearwater Fine Foods Inc.-Management Training Program

In 2008, I developed a one day session, which formed part of a five day Management Training Program Clearwater. I continue to instruct this program where mid level management are trained in a variety of topics, including budgeting, break even analysis and basic elements of financial statement analysis. There were roughly 30 attendees from throughout Atlantic Canada at each session.

Deloitte & Touche LLP Calgary

In June 2009, I developed a two day course for students preparing for the Uniform Final Evaluation who are now in the CASB (CA School of Business) program held for students studying in Western

Canada. The course included how the UFE was marked, question writing, question marking and one on one sessions.

Ernst and Young LLP

In 2016, I developed elements of a six day CFE Training Program for Ernst and Young LLP used when I taught their Atlantic group of CFE students. In 2017 I developed their National CFE Preparation Program used across the country with over 300 students.

Densmore Consulting Services Inc.

I have been a lecturer for Densmore Consulting Services Inc. since 2007. I have lectured for students preparing to write the Ontario School of Accountancy Exams and the Uniform Final Evaluation, and most recently the CFE. I have lectured on topics including Performance Measurement, Taxation, Assurance, Governance Strategy and Risk Management and Study Plans and Stress Management. Students sizes are in excess of 300 students per lecture.

Institute of Chartered Accountants of Nova Scotia (ICANS) now CPA Nova Scotia

I have taught a variety of courses for ICANS and now CPA Nova Scotia over the last fifteen years, including:

- Provincial Law
- Accounting Update for Members in Industry
- Financial Instruments for Not for Profits
- Not for Profit Accounting

Institute of Certified General Accountants of Nova Scotia (CGANS)

I have taught Not for Profit Accounting professional development updates for CGANS in 2000.

Institute of Certified Management Accountants of Nova Scotia

I have taught Not for Profit Accounting professional development updates for CMANS in 2001 and 2003.

PROJECTS IN PROFESSIONAL ACCOUNTING EDUCATION
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Development of course: Financial Instruments for Not for Profits (2007) for ICANS

Course Materials: Public Sector Accounting: MPA (M) Program for CFAME, Dalhousie University

National Practice Exams for KPMG LLP – Densmore Consulting Services (Marker Coordinator – 1996-2001)

Densmore Consulting Services (DCS) contracts with KPMG LLP to provide marked practice simulations to candidates preparing for their UFE, and now the CFE over the course of the summer. My responsibilities included marker recruitment, quality control and reporting detailed results to KPMG and DCS. This contract involved approximately 500 students and 50 markers, located across Canada.

Canadian Institute of Chartered Accountants: Marker and Assistant Supervisor 1995-2005

As a marker, I marked papers written by students challenging the Uniform Final Evaluation, on which a pass is one of the requirements needed to attain the Chartered Accountant designation. In 2003 I was an assistant supervisor wherein I made decisions on students who were at the borderline of a passing grade. I also supervised other members of the marking team to ensure consistency in evaluation of papers.

LEARNING MATERIALS FOR UNIVERSITY TEXTBOOKS

Case study written for Keiso, Weygandt, Young, Wiecek, Intermediate Accounting, Volume 1: 8th Canadian edition (2008): Wiley, also 9th Canadian edition (2011)

Case study written for Intermediate Accounting 5th edition, *Beechy, Conrod and Farrell*, McGraw-Hill Ryerson 2011

Case study written for Intermediate Accounting 6th edition, *Beechy, Conrod and Farrell*, McGraw-Hill Ryerson 2014

Case study written for Intermediate Accounting, 7th edition, *Beechy, Conrod and Farrell*, McGraw-Hill Ryerson 2016

Text review: Keiso, Weygandt, Young, Wiecek, Intermediate Accounting, Volumes 1 and 2: 8th Canadian edition (2008): Wiley.

Text review: Beechy and Conrod Intermediate Accounting, Volumes 1 and 2: 4th Canadian edition (2008)

Text review: Managerial Accounting by Garrison, Chesley, Carroll, Webb, Tenth Canadian Edition, 2013 McGraw-Hill Ryerson.

Text review: Auditing: The Art and Science of Assurance Engagements, 13th Edition Arens, Elder, Beasley, Spletstoesser, Jones, 2016 Pearson

Text review: Managerial Accounting by Braun, Tietz and Beaubien 3d Canadian Edition 2017 Pearson

PowerPoint Update:

Intermediate Accounting, Eleventh Canadian Edition, *Kieso, Weygandt, Warfield, Young, Wiecek and McConomy*, 2016 Wiley

Auditing: The Art and Science of Assurance Engagements, 13th Edition *Arens, Elder, Beasley, Spletstoesser, Jones*, 2016 Pearson

COMMUNITY SERVICE ACTIVITIES

- Volunteer, Saint John Ambulance Therapy Dog Program 2016 to present
- Treasurer, Westmount School Association 2013-2015
- Member, Professional Conduct Committee, CPA NS 2015 to present
- Treasurer, Halifax Hawks PeeWee Female A Team 2013
- Member of Council of Institute of Chartered Accountants of Nova Scotia (1998-2000)
- Member of Parents Committee: Grace Note Daycare Centre (2005 to 2009)
- Point Pleasant Park Advisory Committee 2006

UNIVERSITY SERVICE ACTIVITIES

JDCC Case Competition Coach, Accounting Team 2009-2017

Academic Integrity Officer 2016 and 2017
Dalhousie Appeals Committee 2015-2016