

SAMANTHA TAYLOR, DBA (ABD), CPA, CA

Curriculum Vitae

Senior Instructor | Accountancy | Information Science
Faculty of Management | Faculty of Graduate Studies
Dalhousie University

Samantha.Taylor@Dal.ca
[Institutional Webpage](#)

EDUCATION

- 2021 – (exp. 2024) Doctor of Business Administration
TBS Education,¹ Toulouse, France
Dissertation: Finfluencer, Where's My Cash? Examining the effects of parasocial relationships and digital emotional contagion on teaching effectiveness in a new media era
Supervisors: Stéphane Thion, PhD & Jorien Louise Pruijssers, PhD
- 2018 – 2019 Professional Master of Education, Classroom Specialist
Queen's University, Canada
- 2004 – 2007 Bachelor of Commerce, Accounting
Haskayne School of Business, University of Calgary, Canada

EXPERIENCE

- 2021 – Present Senior Instructor, Accountancy & Information Science²
Faculty of Management, Dalhousie University
 - 2022 Management Excellence in Teaching Award recipient
 - Host a podcast supporting management learners
 - On Education Leave from January to December 2024
- 2012 – Present Session Leader and Online Facilitator
CPA Western School of Business & CA School of Business
 - 2017 David Inhaber Distinguished Facilitator Award recipient
- 2019 – 2021 Lead, National Marking Centre
CPA Canada Professional Education Program
 - Responsible for an annual multi-million-dollar budget to hire, train, and evaluate over 600 CPA contract educators

¹ AACSB, AMBA & EQUIS accredited

² Jointly appointed as of July 1, 2023

- 2018 – 2021 Instructor of Accountancy
Faculty of Management & School of Graduate Studies, Dalhousie University
- Re-developed three senior-level undergraduate/graduate accounting courses: Cost Management, Intermediate Financial Accounting II, and Advanced Accounting II (consolidations)
- Summer 2020 Co-Instructor of Capstone 2
CPA Canada Professional Education Program
- Of over 180 experienced session leaders, I was one of two CPAs selected to present a two-day online workshop in July 2020 that was mandatory for over 5,500 CPA candidates and optional for 2,000

RESEARCH

Interests

Financial Literacy | Parasocial Relationships | Digital Emotional Contagion | New Media
 ICT | Knowledge Transfer | Professional Education | Teaching Effectiveness | Accounting | Audit

Journal Publications (refereed)

Taylor, S. & Charlebois, S. (2024). *Teaching Dossier Guidance for Professional Faculty: An evidence-based approach for demonstrating teaching effectiveness*. *Frontiers in Education*.
<https://www.frontiersin.org/article/10.3389/feduc.2024.1284726/abstract>

Taylor, S., Charlebois, S., Crowell, T. & Cross, B. (2024). *The Paradox of Corporate Sustainability: Analyzing the moral landscape of Canadian grocers*. *Frontiers in Nutrition*.
<https://doi.org/10.3389/fnut.2023.1284377>

Taylor, S. & Thion, S. (2023). *How has Teaching Effectiveness been Conceptualized? Questioning the consistency between definition and measure*. *Frontiers in Education*.
<https://doi.org/10.3389/feduc.2023.1253622>

Wood, D. A., **Taylor, S.** and 325 others et al. (2023). *The ChatGPT artificial intelligence chatbot: How well does it answer accounting assessment questions?* *Issues in Accounting Education*: 1-28. <https://doi.org/10.2308/ISSUES-2023-013>

Manuscripts under Review

Taylor, S. Cross, B., Nissen, A., McGregor, J. & Richards, N. (Under Review – second round revision). *From the Classroom to Journal Publication: A Guide to Publishing Accounting Pedagogy*. *Issues in Accounting Education*.

Taylor, S., **Taylor, S.**, Lin, S. & Keselj, V. (Under Review – second round revision). *Hey ChatGPT - is a Louis Vuitton bag an Investment? Evaluating GPT-3.5 and GPT-4's Readiness for Use in Financial Literacy and Education*. Journal of Emerging Technologies in Accounting.

Works in Progress

Taylor, S. *New Media Influencer-Follower Parasocial Relationships: Antecedents, determinants, and outcomes*. (June 16, 2024). Available at SSRN: <https://ssrn.com/abstract=4890435>

Taylor, S. & Lin, S. *CPA Canada's Professional Education Program Educators: Who they are, how they are hired and trained, and their opinions on the future of the profession*.

Sevel, R.-L., Garriga Cots, E., & **Taylor, S.** *A Mixed Methods Analysis of Teaching Methods' Effectiveness of Business Ethics in Professional Graduate Accounting*.

Music, J., Dalton., K., Chawla, A., **Taylor, S.** & Charlebois, S. *Food & the Metaverse*.

Taylor, S., Conrod, C. & Mongeon, P. *Do Canadian management scholars achieve greater research impact through interdisciplinary collaboration?*

Taylor, S., Riddle, P., Henkel, M., & Mongeon, P. *The Evolution of Teaching Effectiveness: a bibliometric perspective*.

Instructional Resources and Cases (refereed)

Taylor, S., Barnard, K., McGregor, J., & Rafuse, A. (2024). *Deloitte Canada's Co-Created ICT Simulation for Advanced Accounting*. Journal of Emerging Technologies in Accounting. <https://doi.org/10.2308/JETA-2022-020>

Taylor, S. & McGregor, J. (2023). *Goode Food Trucks Inc*. Accounting Perspectives. <https://doi.org/10.1111/1911-3838.12337>

Taylor, S., Riddle, P., Crowell, T., Bullock, A., & Chisholm, K. (2023). *Ted's Teas: A Two-Part Accounting and Audit 'Crossover' Case*. Accounting Perspectives. <https://doi.org/10.1111/1911-3838.12334>

Manuscripts Under Review

Cross, B., & **Taylor, S.** (Under Review – second round revisions). *Healthy Meals 4 Kids: a four-part 'CPA Way' approach to client acceptance, planning, and reporting in assurance education*. Accounting Perspectives.

Works in Progress

Cross, B., Taylor, S., Sevel, R.-L., Borokinni, E. & **Taylor, S.** *Operation Entrepreneur: Veterans transitioning from the Canadian Armed Forces to civilian life, an instructional case*.

Sevel, R.-L. & **Taylor, S.** *Assurance in a Digital Age: An audit training simulation*.

Taylor, S. & Cross, B. *Enabling Students' Professional Competency: Choose your own cost management project*.

Book Chapter (refereed)

Taylor, S., Sundararajan, B. & Munroe-Lynds, C.-L. (2022). *Live Long and Educate: Adult Learners and Situated Cognition in Game-based Learning*. Handbook of Research on Acquiring 21st Century Literacy Skills Through Game-Based Learning. Lane, C.-A. IGI Global.
<https://www.igi-global.com/chapter/live-long-and-educate/294926>

Abstract under review

S. Taylor. *The CPA Way: An Accounting Prof's Nonlinear Academic Pursuits*. Doing Early Academic Careers Differently. Deal, N. & Williams, K. Taylor & Francis/Routledge

Books

Presley, J. & **Taylor, S.** (2024). *Guide to Brazilian Jiu-Jitsu presented by Presley BJJ*.
<https://www.samanthataylor.co/guide-to-bjj>

Taylor, S., Laguduva, S., & Bury, K. (2023). *2023 CPAWSB's Candidate Journey eBook*. Chartered Professional Accountants Western School of Business.
<https://www.cpawsb.ca/candidate-journey-cpa-pep-2023>

Chapters and Case Studies

Mongeon, P., McGregor, J., Biesterfeld, T., **Taylor, S.**, Hare., M., Riddle, P. (2022). Case Studies published in *Information in Society*. Available at
<https://pmongeon.github.io/information-in-society/>

Johnstone, N. & **Taylor, S.** (2022). Longbottom, Launder, and Lounge: An immersive 3-part case exploring consolidations at and after acquisition, foreign exchange transactions and wholly owned subsidiaries, and hedging. [[link](#)]

- Co-authored a three-part case study for publication in *Advanced Accounting in Canada* (1st ed.) by Johnstone, N., Dewald, K. and Wilson, C. Pearson.

Kimmel, P., Weygandt, J., Kieso, D., Trenholm, B., Irvine, W., Burnley, C. & **Taylor, S.** (2020). *Internal Control and Cash*. Financial Accounting: Tools for Business Decision Making (8th ed.). Wiley. [[link](#)]

- Technical updates to incorporate current issues impacting internal control and cash such as blockchain and security. Minor updates included dates and rates to existing text, examples, and problem sets.

Kimmel, P., Weygandt, J., Kieso, D., Trenholm, B., Irvine, W., Burnley, C. & **Taylor, S.** (2020). *Reporting and Analyzing Long-Lived Assets*. Financial Accounting: Tools for Business Decision Making (8th ed.). Wiley. [[link](#)]

- Authored new examples and updated infographics. Minor updates included dates and rates to existing text, examples, and problem sets.

CONFERENCE PROCEEDINGS

Paper (referred)

Mongeon, P., Conrod, C., & **Taylor, S.** (2022). *Do Canadian management scholars achieve greater research impact through interdisciplinary collaboration?* Administrative Sciences Association of Canada Conference. Halifax, NS.

Abstracts (refereed)

Taylor, S., **Taylor, S.**, Lin, S. & Keselj, V. *Hey ChatGPT - is a Louis Vuitton bag an Investment? Evaluating GPT-3.5 and GPT-4's Readiness for Use in Financial Literacy and Education.* (2024). 9th IAFOR International Conference on Education, Hawaii, USA.

Bullock, A., Paliwal, K. & **Taylor, S.** (2022). *Accounting in the Open: Accessible, co-created, original, management education tools.* Dalhousie Conference on University Teaching and Learning (DCUTL). Virtual.

Taylor, S., Riddle, P., Henkel, M., & Mongeon, P. (2022). *The Evolution of Teaching Effectiveness: a bibliometric perspective.* DCUTL. Virtual.

Taylor, S. (2018). *Management of Student Technology Devices as a Distractor to In-Class Engagement.* DCUTL. Halifax, NS.

Paper

Taylor, S., & Thion, S. (2022). *What is Teaching Effectiveness? A review.* TBS Education Research Day. Barcelona, Spain.

PROFESSIONAL & INDUSTRY PUBLICATIONS

Professional Papers

Taylor, S. & Norrie, K. (2019). *Program Evaluation and Design: CPA Canada 2019 National Marking Centre.* CPA Canada. Submitted to CPA Canada senior management.

Norrie, K., **Taylor, S.**, & Filgate, M. (2019). *Collaborative Inquiry: How can you motivate and monitor over 300 Chartered Professional Accountants remotely and provide consistent, high-quality marking and feedback over a two-month period?* CPA Canada.

Industry Research Reports

Charlebois, S., Rankin, A., Taylor, S., Keselj, V.,...**Taylor, S.** et al. (2023). Canada's Food Price Report 2024. <https://www.dal.ca/sites/agri-food/research/canada-s-food-price-report-2024.html>

Charlebois, S., Rankin, A., Taylor, S., Keselj, V.,...**Taylor, S.** et al. (2022). Canada's Food Price Report 2023. <https://www.dal.ca/sites/agri-food/research/canada-s-food-price-report-2023.html>

Charlebois, S., **Taylor, S.**, Taylor, S., & Music, J. (2022). *Dealing with “Greedflation” – Part II*. Dalhousie University Agri-Food Analytics Lab. Accessible at: <https://www.dal.ca/sites/agri-food/research/greedflation.html>

- Acknowledged by name during opening testimony for the Canadian House of Commons standing committee on finance on September 28, 2022.

Taylor, S., Charlebois, S., (2022) Canadian Grocers: Measuring “Greed” in the Era of Consumer Distrust. Dalhousie University Agri-Food Analytics Lab. Accessible at <https://www.dal.ca/sites/agri-food/research/greedflation-3.html>

Industry Articles

CPA Western School of Business blog supporting learners (<http://blog.cpawsb.ca>) uses a conversational approach to communicate timely and evergreen material. The aim is to mix technical accounting skills with enabling or “soft” skills engagingly. Before publication, each posting is subjected to a review process by editors and subject matter experts. A brief excerpt of each piece I contributed is available at www.samanthataylor.co

- 2 posts written in 2024
- 2 posts written in 2023
- 14 posts written/co-written in 2022
- 28 posts written/co-written in 2021.
- 15 posts written/co-written in 2020.
 - 5 posts in the [Top 10 Most Read CPAWSB Blog Posts from 2020](#)
- 2 posts written in 2019
 - 1 post in the [Top 5 Most Read CPA PEP Blog Posts from 2019](#)

Industry Technical Texts³

CPA Canada. (2018/19/20/21). Professional Education Program: *Common Guides and Training Components* – co-development and co-technical review of policy and training materials.

- Co-authored the 2018 and co-updated the 2019, 2020, and 2021 Candidate and Facilitator Guides distributed to all CPA PEP candidates and online facilitators
- Co-updated the 2018, 2019, 2020, and 2021 CPA Canada ‘Session Leader Guide’
- Co-updated the 2018, 2019, 2020, and 2021 CPA Canada ‘Mentor Guide’
- Co-updated the 2018, 2019, 2020, and 2021 CPA Canada ‘Session Leader Training Materials’
- Co-updated the 2018, 2019, 2020, and 2021 CPA Canada ‘Online Facilitator Training Materials’

³ The following citations represent contributions to technical texts that are distributed to students and educators as resources throughout the CPA PEP (Professional Education Program) and PREP program. These texts are used by over 20,000 CPA candidates and thousands of CPA educators each year and count among the most widely distributed documents the organization publishes.

CPA Canada. (2017/18). PREP Program: *Financial Reporting and Performance Management* – Professional technical review of existing material.

CPA Canada. (2017). Professional Education Program: *Core 1 Module* – Self Assessment Entrance Exam. Technical review and updates to examination content.

CPA Canada. (2017). Professional Education Program: *Core 2 Module* – Professional authorship of e-book materials. Topics included:

- **Management Accounting:** Relevant information for short-term decisions, master and cash budgets, variance analysis, performance management – big picture, pricing, quality control and process improvement, information systems – data integrity, information systems – design, acquisition and development, and balanced scorecard.
- **Strategy and Governance:** Governance – organizational structures, enterprise risk management, and ethics and corporate social responsibility.

CPA Canada. (2017). Professional Education Program: *Assurance Module* – Professional technical review of existing material, corresponding assignments, and weekly examination materials development. Topics included:

- **Assurance:** Financial reporting needs and systems, accounting policies and transactions, financial report preparation, financial statement analysis, internal control, internal and external audit requirements, internal audit projects and external assurance engagements, and comprehensive audit projects.

CPA Canada. (2017). Professional Education Program: *Financial Reporting Module* – Professional technical review of existing material.

CPA Canada. (2017). Professional Education Program: technical review of existing module material. *Finance, Performance Management, Taxation, Capstone 1, Taxation*

CPA Canada. (2016/17). Professional Education Program: *Core 1 Module*. Professional technical review of existing material and development of corresponding assignments and weekly examination materials. Topics included:

- **Financial Reporting:** Accrual accounting, cash equivalents, accounts receivable, revenue recognition, inventory, related-party transactions, government grants, property, plant and equipment, impairment, decommissioning obligations, assets held for sale and discontinued operations, contingencies, income taxes, foreign currency transactions, subsequent events, hedging, foreign operations, changes in accounting, investments – passive, investments in associates, leases, management discussion and analysis, earnings per share, business combinations, goodwill and intangible assets, interim reporting, and reportable segments.
- **Assurance:** Key audit concepts, audit stages, client acceptance and knowledge of business, audit risk, materiality, going concern, analytical procedures, assertions, audit strategy, audit evidence, tests of controls, substantive procedures, sampling, evaluation of misstatements, audit reporting, and rules of professional conduct.
- **Taxation:** Personal and business income, personal – sources of income, personal – administration, personal – employee versus contractor, personal – business income, sales tax, legal forms and structures, personal – property income, personal – capital gains and

losses, personal – other deductions, personal – lifetime capital gains exemption, corporate – taxes payable, corporate – division C deductions, personal – taxes payable, and personal deferred income plans.

- **Finance:** Valuation – the big picture, valuation – asset-based approaches, valuation – income-based approaches, valuations – tangible and intangible assets.

SERVICE TO THE SCHOOL, FACULTY, UNIVERSITY, AND PROFESSION

Service to the School, Faculty and University

2025 -	Information Management Program Committee, Member, Faculty of Management, Dalhousie University
2024 - Present	Dalhousie Consulting Association, Faculty Advisor, Faculty of Management, Dalhousie University
2023 - Present	IS Working Group, Faculty of Management, Dalhousie University
2021 - Present	Dalhousie Sports Business Society, Faculty Advisor, Dalhousie University
2021 - Present	DFA Travel Fund Committee, Member, Faculty of Management, Member, Dalhousie University
2021 - Present	Dalhousie Leadership in Teaching Excellence Cluster 3 - Co-Lead
2023	Decanal Review, Faculty of Management, Dalhousie University
2023	HSP Scholarship Reviews, Dalhousie University
2022 – 2023	Rank, Appointment, Tenure and Salary Committee, Member, Rowe School of Business, Faculty of Management, Dalhousie University
2021 – 2023	Structure Committee, Faculty of Management, Member, Dalhousie University
2021 – 2023	CPA Competency Map Ongoing Annual Updates, Lead, Faculty of Management, Dalhousie University
2022	Hiring Committee, Limited Term Appointment, Accountancy Area Group, Committee Chair, Faculty of Management, Dalhousie University
2022	Killam Predoctoral Scholarship Review, Dalhousie University
2022	Hiring Committee, Professoriate Stream Tenure or Tenure-Track, Management Area Group, Committee Member, Faculty of Management, Dalhousie University

2022	Hiring Committee, Instructor Member Stream Tenure or Tenure-Track, Management Area Group, Committee Member, Dalhousie University
2020 - 2021	RSB Re-organization Implementation Group, Committee Member Dalhousie University
2019 - 2021	CPA Competency Map (2020) Data Analytics Integration, Lead, Faculty of Management, Dalhousie University
2019 - 2021	CPA Competency Map (2019) BComm Program Compliance, Lead, Faculty of Management, Dalhousie University
2021	Scotia Scholars Grant Reviewer, Dalhousie University
2020	Rumble in the Rowe Undergraduate and Graduate Presentations, Judge, Faculty of Management, Dalhousie University
2019 – 2020	Jeux de Commerce Team, Faculty Co-Advisor, Dalhousie University
2019 –2020	Jeux de Commerce Accounting, Coach, Dalhousie University
2018 – 2020	Rank, Appointment, Tenure and Salary Committee, Member, Rowe School of Business, Faculty of Management, Dalhousie University
2017 – 2019	Rank, Appointment, Tenure and Salary Committee Instructor Member Guideline Task Force, Member, Faculty of Management, Dalhousie University.
2018	CPA graduate diploma in accounting analysis, Co-Lead, Faculty of Management, Dalhousie University

Contributions to the University Through Service to the Community

2022 - Present	Josh Presley Brazilian Jiu-Jitsu – Volunteer Business Advisor, Wellington, NS
2019 – 2022	MyPAQ – Advisor and Corporate Director, Halifax, NS
2020 – 2021	Princes’ Trust Operation Entrepreneur – Speed Networking “Advisor” Halifax, NS

Service to the Accounting Profession

2018 - Present	Lead Policy Advisor, CPA Western School of Business (CPAWSB)
2024	Reviewer, Accounting Perspectives

2024	Reviewer, Conference - Management Education Division, Administrative Sciences Association of Canada
2024	Reviewer, Journal of Infrastructure, Policy and Development
2024	Reviewer, Video Lectures, <i>Introduction to Financial Accounting</i> , Pearson
2023	Reviewer, Pre-development Textbook, <i>Advanced Accounting Canada 2nd Ed.</i> , Pearson
2021 - 2022	Reviewer, Journal of Accounting & Finance
2016 - 2023	CPA Educator Co-Trainer, CPAWSB
2013 - 2021	Mentor, CPAWSB/CA School of Business (CASB)
2021	Volunteer CPA CFE Mentor, CPAWSB
2021	CPA Mentor Focus Group, CPAWSB
2020	Education-Oriented Working Group – Committee Member, The Canadian Academic Accounting Association (CAAA)
2019 - 2020	Grant Reviewer, CPA Canada
2015 - 2017	Capstone 1 Volunteer Panel On-site Coordinator, CPAWSB, Calgary, AB
2014	CA Educator Representative - Junior Achievement, CASB, Calgary, AB
2014	ATCO – EPIC Program Co-Lead, Calgary, AB
2012 - 2015	Ups and Downs Calgary Down Syndrome Organization – Board Treasurer, Calgary, AB

TEACHING

Dalhousie University

Courses Developed and Taught

COMM3111/BUSI6108 Intermediate Financial Accounting II
 COMM3116/BUSI6106 Cost Management
 COMM4102/BUSI6109 Advanced Accounting II

Courses Taught

COMM1101/MGMT1101 Introductory Financial Accounting
 COMM1102/MGMT1102 Introductory Management Accounting

CPA Professional Education Program

Courses Taught (Session Leader)

Core Module 1 – Financial Accounting, Audit and Assurance, Taxation, and Finance
Core Module 2 – Management Accounting, Strategy and Governance, and Finance
Assurance Elective – Audit and Assurance, and Advanced Financial Accounting
Taxation Elective – Advanced Taxation
Performance Management –Advanced Management Accounting, and Strategy and Governance
Capstone 1 – Group case and presentation preparation
Capstone 2 – Common Final Examination Day 1, 2, and 3 policy, strategy and practice cases

Courses Taught (Online Facilitator)

Core Module 1 – Financial Accounting, Audit and Assurance, Taxation, and Finance
Core Module 2 – Management Accounting, Strategy and Governance, and Finance
Assurance Elective – Audit and Assurance, and Advanced Financial Accounting
Taxation Elective – Advanced Taxation
Performance Management –Advanced Management Accounting, and Strategy and Governance
Capstone 1 – Group case and presentation preparation
Capstone 2 – Common Final Examination Day 1, 2, and 3 policy, strategy and practice cases

CA School of Business

Courses Taught (Online Facilitator)

Module 1 – Private Company Focus: Financial Reporting, Assurance, and Taxation
Module 3 – Public Company Focus: Consolidations, Foreign Currency, and Taxation
Module 5 – Public Company Focus: Governance, Strategy, and Uniform Final Evaluation prep

AWARDS, GRANTS, AND HONOURS

Awards

2024. (Recipient). Best *Accounting Perspectives* Case Award for *Ted's Teas: A Two-Part Accounting and Audit "Crossover Case"*. Canadian Academic Accounting Association.

2024. (Recipient). Notable Contribution to the Literature Award for *The ChatGPT Artificial Intelligence Chatbot: How Well Does It Answer Accounting Assessment Questions?* Accounting Information Systems, American Accounting Association

2022. (Recipient) Faculty of Management Teaching Excellence Award. Faculty of Management. Dalhousie University.

2019. (Nominee) Management Excellence in Teaching Award. Faculty of Management. Dalhousie University.

2017. (Recipient) David Inhaber Distinguished Facilitator Award. CPAWSB.

Grants

2024. Supplemental Educational Leave Grant. Dalhousie University. **Principle Investigator.** (10,264).

2023. Knowledge Mobilization Grant. Centre for Learning and Teaching, Dalhousie University. **Principle Investigator.** (1,800).

2022. Dean's Grant. Faculty of Management, Dalhousie University. **Principal Investigator.** (2,000).

2022. Social Sciences and Humanities Research Council (SSHRC) Explore Grant. **Principal Investigator.** (5,000).

2022. Rowe School of Business (RSB) Research Grant. Dalhousie University. **Principal Investigator.** (4,000).

2021. Scholarship of Teaching and Learning Research Grant. Centre for Learning and Teaching. Dalhousie University. **Principal Investigator.** Dr. Philippe Mongeon, Co-Applicant. (2,977).

2021. Open Education Resource (OER) Grant. Centre for Learning and Teaching and Dalhousie Libraries. Dalhousie University. **Co-Investigator.** Dr. Philippe Mongeon, Project Lead. (6,872).

2021. Rowe School of Business (RSB) Research Grant. Dalhousie University. **Principal Investigator.** (3,000).

2021. Teaching and Learning Enhancement Grant. Centre for Learning and Teaching. Dalhousie University. **Principal Investigator.** (1,920).

2020. Incorporating Equity, Diversity, Inclusivity and Accessibility (EDIA) in the Classroom. Faculty of Management. Dalhousie University. **Principal Investigator.** (485 CAD).

Honours

Celebration of Achievement, Rowe School of Business, Dalhousie University.

- 2023 - Invited guest of three students
- 2022 – Invited guest of three students
- 2021 – Invited guest of three students
- 2020 – Invited guest of one student
- 2019 – Invited guest of three students
- 2018 – Invited guest of two students

University Sports Academic All-Canadian Celebration, Dalhousie University.

- 2020 – Invited guest of one student

DESIGNATIONS, MEMBERSHIPS, CONFERENCES AND WORKSHOPS

Professional Designations

2015 – Present Chartered Professional Accountant
2011 – Present Chartered Accountant

Memberships

Accounting and Finance Association of Australia and New Zealand – Member
American Accounting Association – Member
Canadian Academic Accounting Association – Member
Chartered Professional Accountants of Alberta – Member
Chartered Professional Accountants of Nova Scotia – Member
Dalhousie Leadership in Teaching Excellence (D-Lite) – Cluster Co-Lead and Member
Dalhousie's Faculty of Management's Teaching Community of Practice – Member
Dalhousie University Agri-food Analytics Lab – Collaborator
Quantitative Science Studies Lab – Collaborator

Conferences (attended)

- Qualitative Accounting Research Symposium (QARS). *Annual Conference*. November 2023. Toronto, ON.
- Contemporary Accounting Research. *Annual Conference*. October 2022. Halifax, NS.
- Administrative Sciences Association of Canada. *Annual Conference – Stronger Together*. Halifax, NS.
- Contemporary Accounting Research. *Annual Conference*. October 2021. Virtual.
- Contemporary Accounting Research. *Annual Conference*. October 2020. Virtual.
- Dalhousie University Conference for Teaching and Learning (DUCTL). *Blended Teaching for Engaged Learning*. May 2022. Virtual.
- CPA Canada The One National Conference 2019. *Accounting for Sustainability*. September 2019. Montreal, QC.
- American Accounting Association (AAA) Annual Meeting. *Bold Transformations Toward a Prosperous Society*. August 2019. San Francisco, USA.
- Canadian Academic Accounting Association (CAAA). *Accounting and the Public Trust*. June 2018. Calgary, AB.
- AAA Twelfth Annual Conference. *Teaching and Learning in Accounting*. August 2019. San Francisco, USA.

- Dalhousie University Conference for Teaching and Learning (DUCTL). *Exploring the Future(s) of Higher Education: Supporting Inclusive Teaching Excellence*. May 2018. Halifax, NS.

Workshops (attended)

- Contemporary Accounting Research (CAR). *Intangibles: The Brave New World of Research*. July 2024. Virtual.
- QARS Ethics Workshop & Panel Discussion. *Building Ethical Leaders*. November 2024. Virtual.
- Contemporary Accounting Research (CAR). *Analysts and Location*. April 2023. Virtual.
- Deloitte Greenhouse. Camp Breakthrough. April 2022. Halifax, NS.
- Faculty of Management. May Research Day. May 2022
- RSB Research Seminar. *Various Presenters*. Academic Year 2021-2. Virtual.
- Faculty of Management, Dalhousie University. *Research Day*. May 2022. Halifax, NS.
- Accounting & Finance Association of Australia and New Zealand (AFAANZ). QualRAN Workshop. *How can accounting researchers better utilise qualitative methodologies to bring social issues and challenges to life*. March 2022.
- AFAANZ. *Technology in Financial Accounting and Audit*. November 2021. Virtual.
- AFAANZ. *Blockchain in Accounting Education*. November 2021. Virtual.
- RSB Research Seminar. *Various Presenters*. Academic Year 2020-1. Virtual.
- RSB Research Seminar. *Various Presenters*. Academic Year 2019-20. Halifax, NS.
- Cross Institutional Technology Enabled Learning Event. *Fostering Faculty Collaboration on Effective Practice with Technology and Teaching*. November 2019. Halifax, NS.
- Pearson's Digital Learning Summit. *Business and Economics*. May 2019. Toronto, ON.
- CAAA Professional Development Day. *Teaching with Technology*. June 2018. Calgary, AB.

INVITED TALKS

Student Presentations

Panel participant. (2023). *Golden Key Honour Society: Social Innovation*. Dalhousie University. Halifax, NS.

Crowell, T. & **Taylor, S.** (2021). *Presentation and discussion: Women in Academia – Dalhousie Accounting Society (DAS)*. Dalhousie University. Virtual.

Taylor, S. & Cross, B. (2021). *Accounting Final Exam Preparation: International Student Success Program (ISS)*. Dalhousie University. Virtual.

Faculty Presentations

Panel participant. (2021). *EDI in the Classroom*. Faculty of Management. Dalhousie University. Virtual.

Taylor, S. (2019). *Cognitive Engagement – Deploying Innovative Tools in the Classroom*. Faculty of Management, Dalhousie University. Halifax, NS.

University Presentations

Guest speaker (2024). Dr. Marshall's audit class. University of Alberta. Edmonton, AB.

Panel participant. (2024). *TBS Education - Doctor of Business Administration*. TBS Education. Virtual.

Moderator (2023). Conrad, C.'s *Teaching, Educational Leadership & Research - Finding Efficiencies: Working Smarter, Not (Necessarily) Harder*. Dalhousie Leadership in Teaching Excellence – Cluster 3. Virtual.

Lazare, J., Manning, P., Sears, J., Thompson, K., Green, I. & **Taylor, S.** (2022). *Active Learning Strategies - The Good, The Bad, The Ugly*. Dalhousie University Leadership in Teaching Excellence – Cluster 3. Virtual.

Taylor, S. & Green, I. (2022). *Mean Tweets: Student feedback*. Dalhousie Leadership in Teaching Excellence. Virtual.

Panel participant (2021). *CPA Careers*. University of Alberta – Master of Accounting. Virtual.

Community & Professional Presentations

Taylor, S. (2024). *Interviews of CPAWSB Award Winners: Guest host role interviewing five 2023 CPAWSB award-winners*. CPA Western School of Business. Virtual.

- James Xu, CPA – Winner of 2023 David Inhaber Distinguished (DID) Facilitator Award <https://youtu.be/4ASrLUVeJil?si=t8-a8nZMXXA9N4FL>
- Mary Ann Knoll, CPA, CA, CMA – Winner 2023 Kouri Berezan Heinrichs (KBH) Award <https://youtu.be/OcGUmnG5SK4>
- Owen Kot, CPA – Winner of Exemplary New Professional Award <https://youtu.be/WhqNtBWUWXY>

Taylor, S. (2023). *Ted's Teas: A Two-Part Accounting and Audit 'Crossover' Case*. AC Audio. Virtual.

Taylor, S. (2023) *Financial Literacy Lightning Talk*. Information Without Borders Conference. Presented in Halifax NS.

Taylor, S. & Bruce, R. (July 22, 2022). Plagiarism FAQ Parts 1 to 4. CPAWSB. Accessible at:

- Part 1: https://youtu.be/TJ_8P73X5oM?si=Epf6lgzt5sLrzQN5
- Part 2: https://youtu.be/IIs_SWgnh-A?si=wPbLm0MM-jH3LRfY
- Part 3: <https://youtu.be/cTNmiTwtM64?si=YDCNkMZ-11UytCI6>
- Part 4: <https://youtu.be/w5EJb1tVsYw?si=VnMCSyMvzPVw9aOL>

Cross, B. & **Taylor, S.** (2022). *Entrepreneurship & Accounting: Post-bootcamp frequently asked accounting, finance and tax questions*. Prince's Trust: Operation Entrepreneur. Virtual.

Taylor, S. (2022). *Interviews of CPAWSB Award Winners: Guest host role interviewing five 2021 CPAWSB award-winners*. CPA Western School of Business. Virtual.

- Lauren Holland, CPA – Winner of 2021 KBH Exemplary New Professional Award: <https://youtu.be/7kK5MXgZl8M>

- Fiona Lee, CPA – Winner of 2021 KBH Facilitator Award:
<https://youtu.be/czqM8aR4KTg>
- Pat Lennox, CPA, CA – 2021 David Inhaber Distinguished Facilitator Award winner:
<https://youtu.be/cZJHftf4Vc>
- Jaden Evanson, CPA – Winner of the 2021 KBH Facilitator Award Winner
 - Part 1: <https://youtu.be/b28UTr8kJAE?si=JHxZUV4V9jpree1l>
 - Part 2: <https://youtu.be/Ntzn0s3thl8?si=PdVbYf77HcXSOGRB>
- Valerie Watson, FCPA, FCA – Winner of 2021 KBH Facilitator Award:
https://youtu.be/0zXU97vnwP4?si=8ptW_aupUaRnh-vK

Cross, B. & **Taylor, S.** (2022). *Entrepreneurship & Accounting: Financial reporting and taxation for Canadian small business*. Prince's Trust: Operation Entrepreneur. Presented in Halifax, NS.

Taylor, S. (2020). *Formative Feedback in Professional Education: A multi-literacy approach for increased learner self-efficacy, a pilot study*. CPA Canada. Virtual.

Taylor, S. (2019). *The CPA Pathway*. ATCO. Calgary, AB.

Taylor, S. (2017). *Case Writing: Theory vs Application of The CPA Way*. CPA Alberta's Annual University Case Competition. Calgary, AB.

Taylor, S. (2014). *Effective Case-Writing for CPA PEP Program*. ATCO. Red Deer, AB.

Industry Workshops & Webinars⁴

Taylor, S. & Marshall, E. (2024 – present). *Experienced Online Facilitator Updates Webinar*. CPAWSB. Virtual.

Marshall, E. & **Taylor, S.** (2024 – Present). *New Candidate Introduction*. CPAWSB. Virtual.

Taylor, S. & Marshall, E. (2024 – Present). *Advanced Standing Candidates*. CPAWSB. Virtual.

Taylor, S. & Marchiel, N. (2017 – 2023). *Experienced Online Facilitator Updates Webinar*. CPAWSB. Virtual.

Marchiel, N. & **Taylor, S.** (N. (2017 – 2023). *New Candidate Introduction*. CPAWSB. Virtual.

Marchiel, N. & **Taylor, S.** (2018 – 2023). *Advanced Standing Candidates*. CPAWSB. Virtual.

Taylor, S. & Marchiel, N. (2018; 2022). *Session Leader Training*. CPAWSB. Virtual.

Marchiel, N. & **Taylor, S.** (2022). *Associate Session Leader – Capstone 2 Training*. CPAWSB. Virtual.

⁴ The following webinars, in-person and synchronous training sessions, and asynchronous videos were delivered to CPA PEP candidates and new and experienced educators to share best practices, technical materials and new pedagogical approaches. Virtual live audiences ranged from 5 – 800 live participants; the average educator live audience was 50 attendees, while the average learner live audience was 200 attendees. Webinars often occur four times yearly; most training sessions are a full day with a typical range of 1 – 4 sessions per year.

Lahti, K., Marchiel, N. & **Taylor, S.** (2019 - 2021). *New Mentor Training*. CPAWSB. Virtual.

Marchiel, N. & **Taylor, S.** (2021). *New Facilitator Training*. CPAWSB. Virtual.

Taylor, S. & Marchiel, N. (2021). *Core 1 Candidate FAQ Pre-Session Video*. CPAWSB. Virtual.

Marchiel, N. & **Taylor, S.** (2021). *Asynchronous Session Leader Training*. CPAWSB. Virtual.

Taylor, S. (2020). *Capstone 2 National Marking Centre, Leadership Training*. CPA Canada. Virtual.

Taylor, S. & Player, K. (2019 - 2020). *Capstone 2 National Marking Centre, New Marker Training – Parts 1 & 2*. CPA Canada. Virtual.

Taylor, S. & Marchiel, N. (2019). *Experienced Facilitator Training*. CPAWSB. Regina, Winnipeg, Vancouver, Edmonton, Calgary, and virtual.

Taylor, S. & Marchiel, N. (2019). *CPA Tutor Trainings*. CPAWSB. Calgary, Vancouver, and virtual.

Marchiel, N. & **Taylor, S.** (2019). *CPA Capstone 1 Training*. CPAWSB. Vancouver and virtual.

Taylor, S. & Marchiel, N. (2019). *Experienced Facilitator Training*. CPAWSB. Virtual.

Marchiel, N. & **Taylor, S.** (2018 - 2019). *PDPA – Post Designation Public Accounting*. CPAWSB. Virtual.

Marchiel, N. & **Taylor, S.** (2018 - 2019). *New Facilitator Training*. CPAWSB. Vancouver, Calgary, and Edmonton.

Taylor, S. (2018). *Capstone 2 Session Leader Training*. CPAWSB. Virtual.

KNOWLEDGE MOBILIZATION

Podcast Host– Guest Speaker Series (2021 – Present)

- An ongoing series supporting management learners available on [YouTube](#), [Spotify](#), [iTunes and other podcasting platforms](#). The podcast shares insights from various professionals, including Dalhousie (Dal) graduates, to contribute to an environment that empowers management learners to set meaningful goals and the confidence to chase after them.
- ‘Short clips’ of 3 – 7 minute ‘clips’ were introduced in 2022 to complement the full 60 – 90 minute episodes
- 50 full podcast episodes and 71 short clips

Courses - Original Pedagogical Materials (2020 – 2024)

The following are contributions to Open Education Resources (OER) for free access, use, re-mix, improvement, and sharing.

- **Financial Tips for Entrepreneurs:** Tax administration, incorporation, profit versus cash, lifetime capital gains exemption, expenses, accountant, financial statements, tax deadlines, tax pitfalls.
 - **Small Lessons:** Financial Tips for Entrepreneurs by Emmanuel Borokinni, Chezarina Mehta, Samantha Taylor under a Creative Commons Attribution-ShareAlike 4.0 International License. Available on [YouTube](#)
 - Recorded by Breanne Peltier and produced by Vishu Handa
- **Cost Management:** Costing systems, cost-volume-profit analysis, control and performance evaluation in decentralized organizations. For students who wish to deepen their understanding of cost management concepts and their impact to an organization's decision-making.
 - **Pre-class mini-lecture videos:** Cost Management by Bryce Cross, Nicole Corkum, Samantha Taylor under a Creative Commons Attribution-ShareAlike 4.0 International License: <https://samanthataylor.co/course/cost/>
- **Advanced Accounting II:** Provides an examination of the interrelated topics of intercorporate investments, business combinations, consolidated financial statements, foreign currency transactions, and foreign operations. The course also covers segmented reporting and not-for-profit accounting
 - **Pre-class mini-lecture videos:** Advanced Accounting II by Nicole Corkum, Bryce Cross, Samantha Taylor under a Creative Commons Attribution-ShareAlike 4.0 International License: <https://samanthataylor.co/course/aa2/>
- **Intermediate Financial Accounting II:** Corporate financial reporting models. Reporting issues related to liabilities and shareholders' equity, including complex debt and equity instruments, corporate income taxes, leases, pensions and other post-retirement obligations, earnings per share, accounting changes and restatements. Focus on International Financial Reporting Standards (IFRS). Pedagogical materials include:
 - **Pre-class mini-lecture videos:** by Nicole Corkum, Bryce Cross, Samantha Taylor is licensed under a Creative Commons Attribution-NonCommercial 4.0 International License: <https://samanthataylor.co/course/ifa2/>
- **Our Community Counts:** Series focused on integrating financial reporting concepts with organizations leading efforts in EDI.
 - **Videos:** Our Community Counts series by Bryce Cross, Nicole Corkum, Samantha Taylor is licensed under a Creative Commons Attribution-NonCommercial 4.0 International License: Available in the Faculty of Management repository and [YouTube](#)

Newsletter – The Accounting Huddle (2021 – 2023)

- Bi-monthly newsletter distributed via email to Dalhousie accounting educators, students, and alumni to extend the sense of our Dal accounting community.
- Compiled, written, and edited alongside recent Dal accounting graduates.

MEDIA

Editorials

Charlebois, S. & **Taylor, S.** (November 8, 2022). Charlebois and Taylor: Accusing grocers of ‘greedflation’ is pointless, but... *Toronto Sun*. Available at: <https://torontosun.com/opinion/columnists/charlebois-and-taylor-accusing-grocers-of-greedflation-is-pointless-but>

Charlebois, S. & **Taylor, S.** (July 12, 2022). “Dealing with ‘Greedflation’”. *Toronto Sun*. Accessible at: <https://torontosun.com/opinion/columnists/charlebois-and-taylor-dealing-with-greedflation>

Interviews

Taylor, S. (May 14, 2023). Discussing RBC’s Insolvency Forecast Report. *CTV News Atlantic with Bruce Frisko*. Available at: <https://youtu.be/wcleRx2uhdA>

Taylor, S. (April 13, 2023) Discussing how Canadian grocers make money. *CBC’s the Fifth estate*. On background.

Taylor, S. (December 20, 2022) Holiday budgeting discussion & live listener questions. *CBC Maritime noon with Bob Murphy*. Accessible at: <https://www.cbc.ca/listen/live-radio/1-38-maritime-noon/clip/15956063-we-hear-international-student-cbu-sydney-whose-roommate>

Taylor, S. (December 9, 2022). “Holiday financial planning”. *Global News Morning*. Accessible at: <https://globalnews.ca/video/9337362/holiday-financial-planning/>

Taylor, S. (December 9, 2022). Thinking out loud with Sheldon MacLeod: Making the holidays less financially stressful. *Saltwire*. Accessible at: <https://www.saltwire.com/halifax/opinion/local-perspectives/thinking-out-loud-with-sheldon-macleod-making-the-holidays-less-financially-stressful-100804554/>

Taylor, S. (December 6, 2022) The Todd Veinotte Show December 6th 2022. CityNews 95.7. Available at: <https://halifax.citynews.ca/2022/12/06/podcast-the-todd-veinotte-show-december-6th-2022-6189081/>

Taylor, S. (December 5, 2022) Canadian food prices expected to jump the first half of 2023. *630 CHED Afternoons*. Available at: <https://podcastaddict.com/episode/https%3A%2F%2Fpdst.fm%2Fe%2Fchtbl.com%2Ftrack%2F745E89%2Ftraffic.megaphone.fm%2FCORU2270402702.mp3%3Fupdated%3D1670281079&podcastId=4054036>

Boynton, S. (December 5, 2022) Food prices set to rise another 5-7% in 2023 after record inflation year : report. *Global News*. Available at <https://globalnews.ca/news/9321958/canada-food-price-report-2023/>

Taylor, S (December 5, 2022) How you can save on groceries amid food inflation. *The News Forum*. Accessible at: <https://www.youtube.com/watch?v=AZAas3q6IjI>

Taylor, S. (November 3, 2022). Why are grocery store profits higher than average amid rising inflation? *The News Forum*. Available at: https://www.youtube.com/watch?v=sSVT0eq_xAo

Taylor, S (...) “Food Price Forecasts” *CTV News Atlantic*. Accessible at: <https://atlantic.ctvnews.ca/video?clipId=2578010&jwsourc=em>

Taylor, S. (August 1, 2022). “Greedflation explained”. *Zoomer Radio AM740*. Accessible at: <https://www.zoomerradio.ca/podcasts/fight-back-on-zoomer-radio-podcast/the-best-of-fight-back-week-of-august-01-2022-saturday-edition/>

Charlebois, S. & **Taylor, S.** (July 12, 2022). “Dalhousie profs study 'greedflation' and rising costs at the grocery store.” *CBC Radio*. Accessible at: <https://www.cbc.ca/player/play/2051404355717>

Kravshik, M., Raynier, L. & **Taylor, S.**, (May 21, 2019). “We’re (CPAs) out there getting stuff done”. *CPA Canada*. Accessible at: <https://www.cpacanada.ca/en/news/accounting/the-profession/2019-05-21-new-cpa-designation>

Magazine

Dal Magazine. (Spring 2022). “The Sam Taylor Podcast: Deloitte Greenhouse X Dal.” *Dalhousie University*. Accessible at: <https://www.hepg.org/special/navigation/her-main/guidelines-for-authors>

Media Mentions

Canada’s Food Price Report 2024 predicts Canadians will finally get relief from “sticker-shock.” (December 7, 2023). *Dal News*. Available at: <https://www.dal.ca/news/2023/12/07/canada-food-price-report-2024.html>

High food prices rile up Canadians. (January 7, 2023). *New York Times*. Available at <https://www.nytimes.com/2023/01/07/world/canada/loblaws-grocery-food-inflation.html>

NP Comment. (December 17, 2022). NP View : Jagmeet Singh, don’t blame capitalism for the price of lettuce. *National Post*. Available at <https://nationalpost.com/opinion/np-view-jagmeet-singh-dont-blame-capitalism-for-the-cost-of-lettuce>

Spurr, B. (December 4, 2022) When dollar goes up, good prices should come down, Dalhousie commerce expert says. *Saltwire*. Available at <https://www.saltwire.com/atlantic-canada/news/when-dollar-goes-up-food-prices-should-come-down-dalhousie-commerce-expert-says-100802238/>

Harris, R. (December 4, 2022) Food will cost families more than \$16,000 in 2023: Report. *Canadian Grocer*. Available at: <https://canadiangrocer.com/food-will-cost-families-more-16000-2023-report>

Milstead, D. (November 23, 2022) Canada's major grocers have the ability to lay 'greedflation' charges to rest- but decline to do so. *The Globe and Mail*. Available at: <https://www.theglobeandmail.com/business/commentary/article-greedflation-or-savvy-selling-grocers-like-leaving-us-guessing/>

Bundale, B. (November 3, 2022) Loblaw tops bit Canadian grocers in profit reports amid inflation surge : analysis. *Global News*. Available at: <https://globalnews.ca/news/9247691/loblaw-big-grocer-profit-inflation-analysis/>

Bundale, B. (November 3, 2022) Grocer profits in 2022 top five-year average, Loblaw beats best results : report. *BNN Bloomberg*. Available at: <https://www.bnnbloomberg.ca/grocer-profits-in-2022-top-five-year-average-loblaw-beats-best-results-report-1.1841324>

Bundale, B. (November 3 2022) Canada's top 3 grocers posted higher profits this year compared to 5-year average: report. *CTV News*. Available at: <https://www.ctvnews.ca/mobile/business/canada-s-top-3-grocers-posted-higher-profits-this-year-compared-to-5-year-average-report-1.6137199>

SELECT INDUSTRY EXPERIENCE

- | | |
|-------------------|---|
| 2013 – 2017 | Private Consulting, Director, Calgary, AB <ul style="list-style-type: none">• Provided consultancy professional services to various companies in energy and private equity sectors, and high net worth individuals. |
| 2011 – 2012 | Canadian Energy Exploration Inc. (TSX-V: XPL), CFO, Calgary, AB <ul style="list-style-type: none">• Joined the organization in 2011 as corporate controller and was competitively selected as CFO after completing the IFRS transition of the company (seven months after beginning tenure as controller). |
| 2007, 2008 – 2010 | Ernst & Young LLP, Intern and Staff Accountant, Calgary, AB <ul style="list-style-type: none">• Contributed to a diverse set of service offerings and client engagements in assurance, mergers and acquisitions, and restructuring, |