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**Perry G. Moore, Ph.D.**  
**Professor**  
**College of Business: Accounting, Finance & Economics**  
**Lipscomb University**  
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### **Academic Background**

Ph.D. University of Georgia.  
M.A. University of Alabama.  
B.S. David Lipscomb College.

### **Certifications**

Chartered Global Management Accountant (CGMA), 2012  
Certification in Risk Management Assurance (CRMA), 2011  
Certified Internal Auditor (CIA), 1986  
Certificate in Data Processing (CDP), 1985  
Certified Public Accountant (CPA), 1985, Tennessee Active Permit.

### **Memberships**

Approved State Specific Ethics Course Presentation Leader, Tennessee State Board of Accountancy, 2018-  
CPE Registry, National Association of State Boards of Accountancy, for group/live CPE presentations, 2012-  
Approved State Specific Ethics Course, Tennessee State Board of Accountancy, 2008-2017  
Delta Mu Delta, 1995-  
Tennessee Society of Accounting Educators, 1993-  
American Institute of Certified Public Accountants, 1986-  
Tennessee Society of Certified Public Accountants, 1986-  
American Accounting Association, 1985-  
Beta Gamma Sigma, 1985-  
Institute of Internal Auditors, 1981-

### **WORK EXPERIENCE:**

#### **Academic Experience**

Charles E. Frasier Professor of Accountancy, Lipscomb University (February, 2019 - Present), Nashville, Tennessee.  
Director of Academic Operations, Lipscomb University (June, 2019 - Present), Nashville, Tennessee. Director of Academic Operations for the College of Business, including the Pfeffer Graduate School of Business  
Director, Graduate Business, Lipscomb University (January, 2017 - May, 2019), Nashville, Tennessee. Provide oversight over Lipscomb's MBA Programs  
Professor of Accounting, Lipscomb University (June, 2005 - January, 2019), Nashville, Tennessee.  
Director, Graduate Business, Lipscomb University (January, 2013 - December, 2016), Nashville, Tennessee. Provide oversight over Lipscomb's MAcc and MBA Programs  
Director, Evening MBA Program, Lipscomb University (January, 2007 - December, 2016), Nashville, Tennessee.  
Director, MAcc Program, Lipscomb University (August, 2006 - December, 2016), Nashville, Tennessee.  
Director, PMBA Program, Lipscomb University (January, 2011 - December, 2012), Nashville, Tennessee.  
Director, Cool Springs MBA Program, Lipscomb University (September, 2011 - December, 2012), Nashville, Tennessee.  
Assistant Director of Graduate Business Programs, Lipscomb University (January, 2007 - December, 2012), Nashville,

Tennessee.

Interim Director of MBA Studies, Lipscomb University (June, 2004 - December, 2006), Nashville, Tennessee.

Director of MBA Admissions, Lipscomb University (January, 1999 - December, 2006), Nashville, Tennessee.

Associate Professor of Accounting, Lipscomb University (June, 1999 - May, 2005), Nashville, Tennessee.

Assistant Professor of Accounting, Lipscomb University (January, 1993 - May, 1999), Nashville, Tennessee.

Acting Director, MBA Program, Lipscomb University (April, 1998 - December, 1998), Nashville, Tennessee.

Graduate Teaching Assistant in Accounting, J. M. Tull School of Accounting, Terry College of Business, University of Georgia (September, 1988 - December, 1992), Athens, Georgia.

Instructor of Business Administration, Lipscomb University (September, 1985 - August, 1988), Nashville, Tennessee.

Computer Systems Manager, David Lipscomb College (August, 1982 - August, 1984), Nashville, Tennessee.

## **Non-Academic Experience**

### **National**

Faculty Resident, Arthur Andersen (May, 1996 - July, 1996), Nashville, Tennessee. This 12-week internship, with Andersen's Nashville office, provided me with real-world work experience to share with my students. I saw first hand how auditing was performed in a Big Four environment. In addition, I saw how technology helped the audit become more efficient and effective, and how Andersen gained an understanding of their client's internal control to enable them to assess control risk.

Assistant EDP Auditor, NLT Corporation (June, 1981 - July, 1982), Nashville, Tennessee.

## **Paid Service**

2015-2016 - 2020-2021: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

2015-2016: WDPAA Joint Power Conference, 2015 Tennessee Ethics - 2 CPE credits (5/14/2015)

2015-2016: State of Tennessee, Office of the Comptroller of the Treasury, 2015 Tennessee Ethics - 1 CPE credit

2014-2015: Tennessee Society of CPA's, 2014 Healthcare Conference, 2014 Tennessee Ethics - 2 CPE credits

2014-2015: Tennessee Society of CPA's, 2014 Federal Tax Conference, 2014 Tennessee Ethics - 2 CPE credits

2014-2015: Tennessee Society of CPA's - Nashville Chapter, 2014 Tennessee Ethics - 4 CPE credits

2014-2015: Tennessee Government Finance Officers Association, 2014 Fall Conference - 1 CPE credit

2014-2015: State of Tennessee, Office of the Comptroller of the Treasury, 2014 Tennessee Ethics - 1 CPE credit

2014-2015: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

2014-2015: Lipscomb University, 34th Annual "Updating the Professional Accountant": 2014 Tennessee Ethics - 2 CPE credits

2014-2015: Kraft CPAs, 2014 Tennessee Ethics - 2 CPE credits

2014-2015: Ingram Industries, 2014 Tennessee Ethics - 2 CPE credits

2014-2015: Frasier, Dean & Howard, 2014 Tennessee Ethics - 2 CPE credits

2014-2015: Deloitte, 2014 Tennessee Ethics - 2 CPE credits

2014-2015: Crowe Horwath, 2014 Tennessee Ethics - 2 CPE credits

2013-2014: Tennessee Society of CPA's, 2013 Tennessee Accounting & Auditing Symposium, 2013 Tennessee Ethics - 2 CPE credits

2013-2014: Tennessee Society of CPA's, 2013 Federal Tax Conference, 2013 Tennessee Ethics - 2 CPE credits

2013-2014: Tennessee Society of CPA's and Healthcare Financial Management Association (Tennessee Chapter) - 2013 Health Care Conference, 2013 Tennessee Ethics - 1 CPE credit

2013-2014: Tennessee Society of CPA's - West Tennessee Chapter, 2012 Tennessee Ethics - 2 CPE credits

2013-2014: Tennessee Society of CPA's - Nashville Chapter, 2013 Tennessee Ethics - 3 CPE credits in state specific ethics and 1 CPE credit in Corporate Governance

2013-2014: Tennessee Society of CPA's - Elk Valley Chapter, 2013 Tennessee Ethics - 2 CPE credits

2013-2014: Tennessee Society of CPA's - Chattanooga Chapter, 2013 Tennessee Ethics (3 CPE credits) and Lessons Learned from Recent Corporate Governance Failures (1 CPE credit)

2013-2014: State of Tennessee, Office of the Comptroller of the Treasury, 2013 Tennessee Ethics - 1 CPE credit

2013-2014: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

2013-2014: Nashville Electric Service, 2013 Tennessee Ethics - 2 CPE credits

2013-2014: Lipscomb University, 33rd Annual "Updating the Professional Accountant": 2013 Tennessee Ethics - 2 CPE credits

2013-2014: Institute of Management Accountants - Nashville Chapter, 2013 Tennessee Ethics - 2 CPE credits

2013-2014: Crowe Horwath, 2013 Tennessee Ethics - 2 CPE credits

2012-2013: Tennessee Society of CPA's, West Tennessee Chapter, 2012 Professional Ethics - 2 CPE credits

2012-2013: Tennessee Society of CPA's and Healthcare Financial Management Association (Tennessee Chapter) - 2012 Health Care Conference, 2012 Tennessee Ethics - 1 CPE credit

2012-2013: Tennessee Society of CPA's - Nashville Chapter, 2012 Professional Ethics (2 CPE credits) and Corporate Governance (2 CPE credits)

2012-2013: Tennessee Society of CPA's - Chattanooga Chapter, 2012 Professional Ethics (2 CPE credits) and Corporate Governance (2 CPE credits)

2012-2013: Tennessee Society of CPA's - 2012 Southeastern Forensic and Valuation Services Conference, 2012 Professional Ethics - 1 CPE credit

2012-2013: TN Society of CPAs, 82nd Annual Convention and Educational Conference, 2012 Professional Ethics - 2 CPE credits

2012-2013: TN Society of CPAs, 2012 Young CPA's Conference, 2012 Professional Ethics - 1 CPE credit

2012-2013: State of Tennessee, Office of the Comptroller of the Treasury, 2012 Professional Ethics - 2 CPE credits

2012-2013: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

2012-2013: Lipscomb University, 2012 Tennessee Ethics - 2 CPE credits

2012-2013: Ingram Industries, 2012 Professional Ethics - 2 CPE credits

2012-2013: Frasier, Dean & Howard, 2012 Professional Ethics - 2 CPE credits

2012-2013: Deloitte, 2012 Professional Ethics - 2 CPE credits

2012-2013: Crowe Horwath, 2012 Tennessee Ethics - 2 CPE credits

2011-2012: TN Society of CPAs, Nashville Chapter, 2011 Professional Ethics - 4 CPE credits

2011-2012: TN Society of CPAs, Elk Valley Chapter, 2011 Professional Ethics - 4 CPE credits

2011-2012: TN Society of CPAs, Chattanooga Chapter, 2011 Professional Ethics - 4 CPE credits

2011-2012: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

2011-2012: NASBA, Evaluate self-study and internet-based course materials for the CPE Registry. Helped develop the QAS program.

2011-2012: Lipscomb University, 2011 Professional Ethics - 2 CPE credits

2011-2012: IMA and TN Society of CPA Memphis Chapters, 2011 Professional Ethics - 2 CPE credits

2011-2012: Healthcare Financial Management Association, Tennessee Chapter's 2011 Spring Institute, Professional Ethics - 4 CPE credits

2011-2012: Frasier Dean & Howard, 2011 Professional Ethics - 2 CPE credits

2011-2012: Association of Government Accountants, Nashville Chapter, Professional Ethics - 2 CPE credits

2011-2012: Association of Government Accountants Southeastern Regional Professional Development Conference, Professional Ethics - 4 CPE credits

2010-2011: TN Society of CPA's, Chattanooga Chapter, Professional Ethics - 4 CPE Credits

2010-2011: PricewaterhouseCoopers LLP, Chattanooga TN office, Professional Ethics - 1 CPE credit

2010-2011: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

2010-2011: NASBA, Evaluate self-study and internet-based course materials for the CPE Registry. Helped develop the QAS program.

2010-2011: Lipscomb University, Professional Ethics - 2 CPE credits

2010-2011: Frasier Dean & Howard, Professional Ethics - 2 CPE Credits

2010-2011: Association of Government Accountants, East Tennessee Chapter, Professional Ethics - 4 CPE credits

2009-2010: TN Society of CPA's, Chattanooga Chapter, Professional Ethics - 4 CPE Credits

2009-2010: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

2009-2010: NASBA, Evaluate self-study and internet-based course materials for the CPE Registry. Helped develop the QAS program.

2009-2010: Lipscomb University, Professional Ethics - 2 CPE Credits

2009-2010: KPMG, Nashville TN Office, Professional Ethics - 4 CPE Credits

2009-2010: IMA and TN Society of CPA Memphis Chapters, Professional Ethics - 2 CPE credits

2009-2010: Healthcare Financial Management Association, Tennessee Chapter's 2009 Spring Institute, Professional Ethics - 4 CPE credits

2009-2010: Frasier Dean & Howard, Professional Ethics - 2 CPE Credits

2009-2010: Association of Government Accountants, Nashville Chapter, Tennessee Ethics - 2 CPE credits

2009-2010: Association of Government Accountants, East Tennessee Chapter, Professional Ethics - 2 CPE credits

2009-2010: ACT/AICPA, Wrote 17 Corporate Governance questions for the BEC portion of the CPA exam

2008-2009: TN Society of CPA's, Elk Valley Chapter, Auditing Update and Corporate Governance - 4 CPE credits

2008-2009: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

2008-2009: NASBA, Evaluate self-study and internet-based course materials for the CPE Registry. Helped develop the QAS program.

2008-2009: Lipscomb University, Professional Ethics - 2 CPE credits

2008-2009: Joseph Decosimo CPAs, Firmwide presentation in Chattanooga, Professional Ethics - 2 CPE credits

2008-2009: IMA and TN Society of CPA Memphis Chapters, Professional Ethics - 2 CPE Credits

2008-2009: American Society of Women Accountants, Chattanooga Chapter, Professional Ethics - 2 CPE credits

2007-2008: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

2007-2008: NASBA, Evaluate self-study and internet-based course materials for the CPE Registry. Helped develop the QAS program.

2007-2008: Lipscomb University, Update in Auditing Standards - 90 minutes

2006-2007: TN Society of CPA's, Elk Valley Chapter, Auditing and Ethics Update - 4 CPE credits

2006-2007: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

2006-2007: NASBA, Evaluate self-study and internet-based course materials for the CPE Registry. Helped develop the QAS program.

2006-2007: Lipscomb University, Update in Auditing Standards - 90 minutes

2005-2006: Texas State Board of Public Accountancy, Provided start-up guidance for their Sponsor Review Program. Trained initial program reviewers.

2005-2006: TN Society of CPA's, Elk Valley Chapter, Auditing and Ethics Update - 8 CPE credits

2005-2006: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

2005-2006: NASBA, Evaluate self-study and internet-based course materials for the CPE Registry. Helped develop the QAS program.

2005-2006: Lipscomb University, Update in Auditing Standards - 90 minutes

2004-2005: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

2004-2005: NASBA, Evaluate self-study and internet-based course materials for the CPE Registry. Helped develop the QAS program.

2004-2005: Lipscomb University, Update in Auditing Standards - 90 minutes

2004-2005: ACT/AICPA, Reviewed 125 auditing questions for the CPA Exam

2003-2004: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

2003-2004: NASBA, Evaluate self-study and internet-based course materials for the CPE Registry. Helped develop the QAS program.

2002-2003: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

2002-2003: NASBA, Evaluate self-study and internet-based course materials for the CPE Registry. Helped develop the QAS program.

2001-2002: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

2001-2002: NASBA, Evaluate self-study and internet-based course materials for the CPE Registry. Helped develop the QAS program.

2000-2001: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

2000-2001: NASBA, Evaluate self-study and internet-based course materials for the CPE Registry. Helped develop the QAS program.

1999-2000: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

1999-2000: NASBA, Evaluate self-study and internet-based course materials for the CPE Registry. Helped develop the QAS program.

1998-1999: Perry Glen Moore, CPA, Providing limited accounting and consulting services.  
1998-1999: NASBA, Evaluate self-study and internet-based course materials for the CPE Registry. Helped develop the QAS program.  
1997-1998: Perry Glen Moore, CPA, Providing limited accounting and consulting services.  
1997-1998: NASBA, Evaluate self-study and internet-based course materials for the CPE Registry. Helped develop the QAS program.  
1996-1997: Perry Glen Moore, CPA, Providing limited accounting and consulting services.  
1996-1997: NASBA, Evaluate self-study and internet-based course materials for the CPE Registry. Helped develop the QAS program.  
1995-1996: NASBA, Evaluate self-study and internet-based course materials for the CPE Registry. Helped develop the QAS program.  
1993-1994 - 1995-1996: Perry Glen Moore, CPA, Providing limited accounting and consulting services.

## **TEACHING:**

### **Courses Taught**

**Courses from the Teaching Schedule:** Accounting for Executives, Acct for Executives, Advanced Accounting, Advanced Accounting, Advanced Auditing & Forensics, Corp Gov, Ethics & Corp Respons, Corp Governance & Internal Contr, Corp Governance & Internal Contrl, Corporate Governance & Business Ethics, Independent Project/Research, Independent Project/Research, Independent Study in Accounting, Intermediate Accounting II, Internship, Internship in Accounting, Internship in Accounting, MBA Graduation Seminar, MBA Orientation Requirements, Principles of Auditing, Prof Certification Preparation, Professional Certification Pro

### **Teaching-Other**

#### **Course Redesign Non-Compensated**

2020-2021 - BU 6000. Course Redesign Non-Compensated.  
2020-2021 - MAcc 6403. Course Redesign Non-Compensated.  
2019-2020 - BU 6000. Course Redesign Non-Compensated.  
2019-2020 - AC 4113. Course Redesign Non-Compensated.  
2019-2020 - BU 6632. Course Redesign Non-Compensated.  
2019-2020 - BU 6010. Course Redesign Non-Compensated.  
2018-2019 - BU 6000. Course Redesign Non-Compensated.  
2018-2019 - BU 6010. Course Redesign Non-Compensated.  
2017-2018 - BU 6033. Course Redesign Non-Compensated.  
2017-2018 - MAcc 6603. Course Redesign Non-Compensated.  
2016-2017 - MAcc 6003 to MAcc 6002. Course Redesign Non-Compensated.

#### **Course (New) - Creation/Delivery: Conventional**

2014-2015 - MAcc 6603. Course (New) - Creation/Delivery: Conventional.  
2009-2010 - PMBA 6053. Course (New) - Creation/Delivery: Conventional.  
2007-2008 - MAcc 6003. Course (New) - Creation/Delivery: Conventional.

#### **Course (New) - Creation/Delivery: Online**

2017-2018 - BU 6010. Course (New) - Creation/Delivery: Online.  
2016-2017 - BU 6000. Course (New) - Creation/Delivery: Online.

#### **Other Teaching Activities**

2020-2021 - Guest Speakers. Other Teaching Activities.  
2020-2021 - Guest Speakers. Other Teaching Activities.  
2020-2021 - Guest Speakers. Other Teaching Activities.  
2019-2020 - Guest Speakers. Other Teaching Activities.  
2019-2020 - Alumni Monopoly Bankers. Other Teaching Activities.

2019-2020 - Guest Speakers. Other Teaching Activities.  
 2018-2019 - Alumni Monopoly Bankers. Other Teaching Activities.  
 2018-2019 - Guest Speakers. Other Teaching Activities.  
 2018-2019 - Guest Speakers. Other Teaching Activities.  
 2017-2018 - Guest Speakers. Other Teaching Activities.  
 2017-2018 - Alumni Monopoly Bankers. Other Teaching Activities.  
 2017-2018 - Tennessee Society of CPAs Student Night. Other Teaching Activities.  
 2017-2018 - Guest Speakers. Other Teaching Activities.

## **INTELLECTUAL CONTRIBUTIONS:**

### **Grid**

Category	BDS	AIS	TLS	Total
Articles in Refereed Journals		11	2	13
Articles-in-Progress (All)		1	2	3
Publications of Non-refereed or Invited Papers				0
Presentations of Refereed Papers		2	4	6

### **Refereed Articles**

Moore, P. G., & Waugh, S. (2021). Lessons From the Past. Tennessee CPA journal, 66 (4), 10-13.  
 Moore, P. G., & Jobe, M. (2021). Working During COVID-19: Staff Observations. Tennessee CPA journal, 66 (3), 10-12.  
 Jobe, M., & Moore, P. G. (2021). Recruiting, Onboarding, and Working During COVID-19: Employers Speak Out. Tennessee CPA journal, 66 (2), 16-20.  
 Moore, P. G. (2020). The Other Side of the Monitor: Student Perceptions and Challenges from the COVID-19 Pandemic. Transnational Journal of Business, Special Is (1), 56-59.  
 Moore, P. G., & Monroe, K. (2020). Avoiding Ethical Issues in a Remote Work Environment. Tennessee CPA journal, 65 (5), 8-9.  
 Moore, P. G. (2020). Suit accuses CEO of taking \$7M. Journal of Critical Incidents, 13 (1), 50-52, doi: 2364-6664.  
 Moore, P. G. (2019). A Lesson in Ethics. Internal Auditor, LXXVI (IV), 64.  
 Moore, P. G. (2019). Staying out of Trouble - What's Your Ethics and Board Rules Awareness? Tennessee CPA journal, 64 (4), 27-29.  
 Moore, P. G. (2016). CPE: Now and the Future. Tennessee CPA journal, 61 (5), 12-14.  
 Moore, P. G. (2016). NFP Board Service Tips. Journal of Accountancy, 221 (6), 18.  
 Moore, P. G. (2015). Ethical Implications of AICPA's New Code of Professional Conduct. Tennessee CPA journal, 60 (1), 6-7.  
 Moore, P. G., Steadman, M., & Crocker, M. H. (2014). State-Specific Ethics Requirement in Tennessee: Is It Effective? Tennessee CPA journal, 59 (6), 12-13.  
 Frasier, C. E., Galbreath, S. C., & Moore, P. G. (2006). Accounting Academy: From High School to the Corner Office. Journal of Accountancy, 201 (5), 65.

### **Refereed Proceedings**

#### **Full Paper**

Moore, P. G. (in press, 2019). Using a Business Simulation Game as a Practice Set in Auditing Courses - Conference canceled by COVID-19. MBAA International.  
 Moore, P. G. (in press, 2019). Suit Accuses CEO of Taking \$7 Million - Conference canceled by COVID-19. MBAA International.

### **Invited Articles/Reviews**

Moore, P. G. (2001). Future of the Profession - An Educator's Viewpoint. Tennessee CPA Newsletter.

### **Presentation of Refereed Papers**

#### **International**

Moore, P. G. (2019-2020). Suit Accuses CEO of Taking \$7 Million - Conference canceled by COVID-19. MBAA International, Chicago, Illinois.

Moore, P. G. (2019-2020). Using a Business Simulation Game (MONOPOLY) as a Practice Set in Auditing Courses - Conference canceled by COVID-19. MBAA International, Chicago, Illinois.

Moore, P. G. (2019-2020, July). SolePoint: Suit Accuses CEO of Taking \$5 Million. Society of Case Research/Global Jesuit Case Series Summer Workshop, Tampa, Florida.

Moore, P. G. (2019-2020, July). Pinnacle Academy. Society of Case Research/Global Jesuit Case Series Summer Workshop, Tampa, Florida.

Moore, P. G. (2016-2017, June). 'New' Knowledge from Professional Ethics Requirements. 2016 ACBSP Annual Conference, Atlanta, Georgia.

### **Regional**

Moore, P. G. (2015-2016, October). 'New' Knowledge from Professional Ethics Requirements. 2015 ACBSP Region 3 Conference, Myrtle Beach, South Carolina.

## **Working Papers**

Moore, P. G. (2020). "Using a Business Simulation Game as a Practice Set in Auditing Courses."

Moore, P. G. (2019). "Phoenix Academy."

Cagle, J. E. & Moore, P. G. (2019). "Rubik's Cube Audit Approach."

## **Intellectual Contributions-Other**

### **Applied or Integrative/application Scholarship**

2012-2013: , , . Based on law and rule changes, rewrote Professional Ethics course for submission to the Tennessee State Board of Accountancy.

2010-2011: , , . Revised and resubmitted the Professional Ethics course to the Tennessee State Board of Accountancy.

2008-2009: , , . Developed a continuing professional education course on Professional Ethics that can be taught in 1-hour, 2-hour, and 4-hour segments. The course was written to comply with the requirement of the Tennessee State Board of Accountancy, which had implemented ethics and state-specific ethics training. The Board maintains a list of approved sponsors of such training and peer reviewed all courses submitted. Approval granted by the board in January 2008.

### **Other**

2011-2012: , , . For Lipscomb's ACBSP Reaffirmation, wrote Volume 3 (the Accounting self-study) for separate accreditation of the accounting unit.

2011-2012: , , . Proof reader of Lipscomb's self-study for ACBSP reaffirmation

## **SERVICE:**

### **Service to the University**

#### **Department Assignments**

##### **Member:**

2015-2016: Accounting Curriculum Standards Review

2009-2010: Graduate Faculty Meeting

##### **Other Institutional Service Activities:**

2020-2021: Web Moderator and Facilitator - Updating the Professional Accountant Seminar

#### **College Assignments**

##### **Assurance of Learning - Institutional Service:**

2015-2016 – 2020-2021: COB AOL Team

##### **Chair:**

2020-2021: Rank, Tenure, and Promotion Committee (Co-Chair)

##### **Faculty Advisor:**

2013-2014 – 2020-2021: Academic Advising

**College Assignments**

**Faculty Sponsor:**

1993-1994 – 2005-2006: Accounting Honor Society

**College Assignments**

**Faculty Sponsor:**

1994 – 2021: Delta Mu Delta, Eta Mu chapter

**College Assignments**

**Mentoring Activities:**

2020-2021: Lipscomb Academy Ignite Program

2016-2017 – 2019-2020: Lunch With Alumni

2018-2019: COB Brown Bag: the Rank, Tenure, and Promotion Process

2016-2017 – 2017-2018: Lipscomb Academy Ignite Program

2016-2017: COB Brown Bag: the Rank, Tenure, and Promotion Process

**Other Institutional Service Activities:**

2020-2021: College of Business Summer Webinar Series

2016-2017: Emerging Leaders

2015-2016: Accounting Faculty Oversight of Financial Best Practices of Ciudad de Angeles IAP (Cozumel Mexico)

2014-2015 – 2015-2016: Lipscomb Academy Ignite Business

2014-2015: Reconnaissance for Graduate Business Global Service Trip

**Writing Student Recommendations:**

2013-2014 – 2020-2021: Career Advising

**College Assignments**

**Member:**

2006 – 2021: Lipscomb University Graduate Business Admission Committee

**University Assignments**

**Committee Chair:**

2007-2008: Lipscomb University Academic Affairs Committee

**University Assignments**

**Committee Chair:**

2015-2016 – 2017-2018: Rank, Tenure, and Promotion Committee

2011-2012 – 2012-2013: Lipscomb University, Rank Tenure and Promotion Committee

**Committee Member:**

2016-2017 – 2020-2021: Graduate Academic Leadership Team

**University Assignments**

**Committee Member:**

2005-2006 – 2006-2007: Lipscomb University Academic Affairs Committee

**University Assignments**

**Committee Member:**

2002-2003 – 2020-2021: Lipscomb University Insurance Committee

**University Assignments**



**Committee Member:**

2010-2011: Lipscomb University, Rank Tenure and Promotion Committee

**University Assignments****Committee Member:**

2014: Lipscomb University, Registrar Search Committee

2013-2014 – 2014-2015: Lipscomb University, Rank Tenure and Promotion Committee

**University Assignments****Other Institutional Service Activities:**

2012: Cool Springs MBA Cohort

2011-2012: Lipscomb University, Official Scorekeeper for Bison and Lady Bison Basketball

**University Assignments****Other Institutional Service Activities:**

1981-1982 – 2020-2021: National Bison Club

2018-2019 – 2019-2020: Rank Tenure & Promotion Committee e-Portfolio Training

**Service to the Profession****Academic Conference: Moderator / Facilitator**

2019-2020: 41st Annual Case Writers Workshop: Society for Case Research, Tampa, Florida. Session Chair and Session Scribe

**Academic Conference: Panelist**

2011-2012: Tennessee Society of Accounting Educators 28th Annual Meeting, Brentwood, Tennessee. Panel - Teaching Pedagogy for Intermediate Accounting and Auditing

2009-2010: Tennessee Society of Accounting Educator's 26th Annual Meeting. Guidance for CPA Exam Success

**Advisor**

2007-2008 – 2009-2010: ACBSP. Mentor to Carlos Albizu University (Doral Florida)

2005-2006 – 2006-2007: ACBSP. Mentor to Tiffin University (Tiffin OH)

**Assurance of Learning - Professional Service**

2007-2008: ACBSP. Member of the visitation team to evaluate the self-study prepared by the University of West Alabama (Livingston)

2005-2006: ACBSP. Chair of visitation team to evaluate the self-study prepared by La Roche College (Pittsburgh PA)

2005-2006: ACBSP. Chair of visitation team to evaluate the self-study prepared by Saint Vincent College (Latrobe PA)

2004-2005: ACBSP. Member of the visitation team to evaluate the self-study prepared by the University of St. Thomas (Houston TX)

**Board Member: Advisory Board**

2015-2016 – 2016-2017: Tennessee Society of CPAs, Brentwood, Tennessee. Member of Council, representing the Nashville Chapter

**Board Member: Board of Trustees**

2015-2016 – 2017-2018: Tennessee Society of CPAs - Nashville Chapter, Nashville, Tennessee. At-Large Board Member of the Nashville Chapter

**Board of Directors: Substantial Involvement**

2018-2019 – 2020-2021: Delta Mu Delta, Brookfield, Illinois. Service in a variety of roles on their board

1993-1994 – 2017-2018: Institute of Internal Auditors, Nashville Chapter, Nashville, Tennessee.

1997-1998 – 2016-2017: Christian Campus Ministries, Inc., Nashville, Tennessee. Service as Treasurer for the non-profit organization that sponsors the Church of Christ's chaplain on the Vanderbilt campus

**Chair: Committee / Task Force**

2017-2018 – 2019-2020: Delta Mu Delta Audit Committee, Brookfield, Illinois. Audit Committee Chair

2017-2018 – 2018-2019: Delta Mu Delta Advisory Board, Brookfield, Illinois. Two year term as chair of their advisory board (composed of past officers)

2013-2014 – 2014-2015: Tennessee Society of CPA's Professional Ethics Committee.

2011-2012 – 2013-2014: Institute of Internal Auditors, Regional Conference Committee. Oversight responsibility for the IIA's regional conferences. Provided direct oversight for the 2012 Southern Regional Conference held in Austin

2007-2008 – 2010-2011: Tennessee Society of CPA's Accounting Education & Career Awareness Committee. Chair: 2007-2010

#### **Chair: Conference / Track / Program**

2013-2014 – 2015-2016: 2016 Institute of Internal Auditors Central Regional Conference, Nashville, Tennessee.

Sponsorship/Exhibitor Chair (2014-2016); Interim Volunteer Co-Chair (2016); Member of Host Conference Committee (May 1-4, 2016)

2012-2013 – 2014-2015: Tennessee Society of CPA's Accounting Academy, Nashville, Tennessee. Served as Director of the TSCPA's "Accounting Academy"

2002-2003 – 2006-2007: Tennessee Society of CPA's Accounting Academy. Director. Planned all activities for this summer camp hosted by Lipscomb.

1997-1998 – 1999-2000: Institute of Internal Auditors 1999 Mid-Atlantic Regional Conference, Nashville, Tennessee.

Conference Chair for 3 day event that provided 19 hours of CPE to 173 attendees from 18 states, Washington DC, and Puerto Rico

#### **Reviewer - Article / Manuscript**

2021-2022: Journal of Critical Incidents, Nashville, Tennessee. Reviewed one article for the JCI (Summer 2021).

2020-2021: Society for Case Research. Fall 2020: Reviewed two critical incidents

2019-2020: Society for Case Research. Spring and Summer 2020: Reviewed a case and two critical incidents

#### **Invited Lecture**

2017-2018: 2017 Delta Mu Delta Biennial Meeting, Baltimore, Maryland. Your Cheatin' Heart - Lessons in Business Ethics (11/3/2017)

2016-2017: Tennessee Society of Accounting Educators, Brentwood, Tennessee. 32nd Annual Meeting - 1 CPE credit (9/30/2016)

2014-2015: Tennessee Society of Accounting Educators 31st Annual Meeting, Brentwood, Tennessee. 2014 Professional Ethics - 1 CPE credit

2012-2013: Tennessee Society of Accounting Educators 29th Annual Meeting, Brentwood, Tennessee. Professional Ethics - 1 CPE credit

2012-2013: 2012 ACBSP Annual Conference, Baltimore, Maryland. Accounting Standards and Criteria (with Commissioner Chuck Fazzi)

2010-2011: Tennessee Society of Accounting Educator's 27th Annual Meeting. Professional Ethics

2008-2009: Tennessee Society of Accounting Educator's 25th Annual Meeting. Professional Ethics

#### **Keynote Address**

2013-2014: 2013 Delta Mu Delta Centennial Meeting, San Antonio, Texas. Business Ethics - opening general session to the Centennial Meeting

#### **Member: Committee/Task Force**

2021-2022: Tennessee Society of CPAs: Scholarship Committee, Nashville, Tennessee. Member of their Scholarship Committee

2015-2016 – 2021-2022: Tennessee Society of CPA's Professional Ethics Committee, Nashville, Tennessee.

2015-2016 – 2021-2022: ACBSP International Teaching Excellence Award Committee, Overland Park, Kansas.

2015-2016 – 2020-2021: Delta Mu Delta Finance Committee, Brookfield, Illinois. Member of FiComm

2014-2015 – 2020-2021: NASBA CPE Standards Working Group, Nashville, Tennessee. The working group is comprised of 13 members representing the various stakeholders in the CPE arena. If the working group determines that revisions or modifications are required, then the working group will make its recommendations to NASBA's CPE Committee, which in turn makes recommendations to the Joint AICPA/NASBA CPE Standards Committee, which in turn makes its recommendation to the respective AICPA and NASBA Boards of Directors.

2016-2017 – 2018-2019: ACBSP Audit Committee, Kansas City, Kansas.

2015-2016 – 2018-2019: ACBSP Region 3 International Teaching Excellence Award Committee, Nashville, Tennessee.

2015-2016 – 2017-2018: Tennessee Society of CPA's - Accounting Career Education Committee, Nashville, Tennessee.

2014-2015 – 2015-2016: Institute of Internal Auditors, Learning Solutions Committee, Orlando, Florida.

2010-2011 – 2014-2015: Tennessee Society of CPA's Accounting Education & Career Awareness Committee.

2012-2013 – 2013-2014: Institute of Internal Auditors, Selection Committee for American Hall of Distinguished Audit Practitioners. Member of selection committee to review nominations and select the recipients for this "hall of fame" for internal audit professionals

2010-2011 – 2013-2014: NASBA CPE Task Force, Nashville, Tennessee. Appointed as a member of the National Association of State Boards of Accountancy CPE Task Force

2011-2012 – 2012-2013: Tennessee Society of CPA's Professional Ethics Committee, Nashville, Tennessee.

2004-2005 – 2011-2012: Institute of Internal Auditors: Regional Conference Advisory Board, Orlando, Florida. Oversight responsibility for the IIA's regional conferences. Provided direct oversight for the 2007 Southeastern Regional Conference hosted in Atlanta

2006-2007 – 2007-2008: Tennessee Society of CPA's Accounting Education & Career Awareness Committee, Brentwood, Tennessee.

2003-2004 – 2007-2008: Institute of Internal Auditors, District 3 Representative for Mid-Atlantic Region, Orlando, Florida. Provided oversight for the IIA's four Tennessee chapters

2005-2006 – 2006-2007: Tennessee Society of CPA's Accounting Education & Career Awareness Committee.

2004-2005 – 2005-2006: Tennessee Society of CPA's Accounting Education & Career Awareness Committee.

2003-2004 – 2004-2005: Tennessee Society of CPA's Accounting Education & Career Awareness Committee.

2002-2003 – 2003-2004: Tennessee Society of CPA's Accounting Education & Career Awareness Committee.

#### **Officer: Organization / Association**

2019-2020 – 2020-2021: Delta Mu Delta, Brookfield, Illinois. Society Treasurer

2016-2017 – 2020-2021: Accreditation Council for Business Schools and Programs Region 3, Kansas City, Kansas. Treasurer

2019-2020: Delta Mu Delta, Brookfield, Illinois. Treasurer of the Society

2015-2016 – 2018-2019: Institute of Internal Auditors, Nashville Chapter, Nashville, Tennessee. Treasurer of the chapter

2014-2015 – 2017-2018: Delta Mu Delta, Brookfield, Illinois. President (through Nov 2015); Past-President and Region 8 Representative (from Nov 2015 to Nov 2017)

2011-2012 – 2013-2014: Delta Mu Delta. Vice-President/President-Elect

2007-2008 – 2011-2012: Delta Mu Delta. Treasurer

2002-2003 – 2003-2004: Tennessee Society of Accounting Educators. President

1997-1998 – 1998-1999: Institute of Internal Auditors, Nashville Chapter. President of the chapter

#### **Other Professional Service Activities**

2020-2021: Tennessee Society of CPAs: Standards for Tennessee CPAs - State Specific Ethics, Nashville, Tennessee. Author for 2021 Update to their State Specific Course

2019-2020: Tennessee Society of Certified Public Accountants - Discover Accounting Program, Nashville, Tennessee. Served as coordinating host for the DAP event at Lipscomb (10/21/2019)

2018-2019: 2019 Nashville IIA Internal Audit Symposium: Emerging Audit Issues Roundtable, Nashville, Tennessee. Moderator/Facilitator of Emerging Audit Issues Roundtable (4/24/2019)

2017-2018: Association of Government Accountants - Nashville Chapter, Nashville, Tennessee. Panel of Higher Education Members (10/09/2017)

2016-2017: Delta Mu Delta Chapter Initiation via Skype, Safat, Kuwait. American University of Kuwait (5/4/2017)

2016-2017: Delta Mu Delta Chapter Initiation via Skype, Skopje, Macedonia. University American College - Skopje (5/3/2017)

2015-2016: Delta Mu Delta Chapter Initiation via Skype, Skopje, Macedonia. University American College - Skopje (5/11/2016)

2015-2016: Delta Mu Delta Chapter Initiation via Skype, Safat, Kuwait. American University of Kuwait (4/28/2016)

2015-2016: Tennessee Society of Certified Public Accountants - Discover Accounting Program, Nashville, Tennessee. Served as coordinating host for the DAP event at Lipscomb (9/21/2015)

2014-2015: 2014 Future Business Leaders of America National Leadership Conference, Nashville, Tennessee. Judge for their

"Emerging Issues" competition

2011-2012: Dean Institute Boardroom Briefing, Nashville, Tennessee. Scott Augenbaum and Kevin Williams: What Every Board Must Know NOW About Cybercrime

2011-2012: State of Tennessee, Department of Revenue, Nashville, Tennessee. Panel member for 2011 General (Regulatory) Ethics training for the Department of Revenue.

2011-2012: Dean Institute Boardroom Briefing, Nashville, Tennessee. Steven Walker and Edgar Armstrong: 'What you Must Know About D&O Insurance'

2011-2012: Dean Institute Boardroom Briefing, Nashville, Tennessee. John Fogarty - You and Your Auditor's Report: Change is on the Way

2009-2010: Nashville Business Journal - 2009 CFO Award Judge. Judge for the 'Large Private' Company Category

### **Presentation**

2021-2022: 2021 Tennessee Society of CPAs 90th Annual Meeting and Convention, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (6/16/2021)

2020-2021: State of Tennessee, Department of the Treasury, Nashville, Tennessee. Facilitated Ethics Discussion for Treasury Department Staff (4/15/2021)

2020-2021: Tennessee Society of CPAs, Brentwood, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (recorded the Society's on-demand webcast for use in 2021; 3/31/2021)

2020-2021: Lipscomb University Updating the Professional Accountant, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (12/10/2020)

2020-2021: Institute of Internal Auditors, Nashville Chapter, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (12/3/2020)

2020-2021: BKD Nashville Office, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (12/2/2020)

2020-2021: HCA Healthcare and Accounting Update 2020, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (11/16/2020)

2020-2021: Carr, Riggs, and Ingram, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (11/12/2020)

2020-2021: Institute of Internal Auditors Memphis Chapter, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (11/9/2020)

2020-2021: Tennessee Society of Accounting Educators 36th Annual Meeting, Nashville, Tennessee. TSAE 16th Annual Meeting (9/25/2020)

2020-2021: Institute of Internal Auditors East Tennessee Chapter, Knoxville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (9/17/2020)

2020-2021: Lipscomb University Center for Teaching and Learning, Nashville, Tennessee. Sedona Training, on behalf of the Rank, Tenure, and Promotion Committee, for the faculty at large (8/31/2020 and 9/3/2020)

2019-2020: Lipscomb University Updating the Professional Accountant, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (12/12/2019)

2019-2020: HCA Healthcare and Accounting Update 2019, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (12/12/2019)

2019-2020: BKD Nashville Office, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (12/4/2019)

2019-2020: Institute of Internal Auditors, Nashville Chapter, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (12/3/2019)

2019-2020: Tennessee Society of CPAs - 2019 Healthcare Conference, Franklin, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (12/2/2019)

2019-2020: Deloitte, Franklin, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (11/6/2019)

2019-2020: Kraft CPAs, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (10/29/2019)

2019-2020: Tennessee Society of CPAs - Nashville Chapter, Franklin, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (10/22/2019)

2019-2020: Tennessee Society of Accounting Educators 35th Annual Meeting, Brentwood, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (9/27/2019)

2019-2020: Institute of Internal Auditors Memphis Chapter, Memphis, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (9/5/2019)

2019-2020: Crosslin CPAs, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (8/20/2019)

2019-2020: HCA Internal Audit Department, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (7/9/19)

2019-2020: Tennessee Society of CPAs 89th Annual Meeting and Convention, Asheville, North Carolina. Standards for Tennessee CPAs: State Specific Ethics (6/11/2019)

2018-2019: Tax Executives Institute - Nashville Chapter, Franklin, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (5/14/2019)

2018-2019: Middle Tennessee Chapter Association of Certified Fraud Examiners 23rd Annual Fraud Conference, Nashville, Tennessee. Your Cheatin' Heart: Lessons in Ethics (3/4/2019)

2018-2019: Lipscomb University Updating the Professional Accountant, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (12/13/2018)

2018-2019: HCA Healthcare and Accounting Update 2018, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (12/13/2018)

2018-2019: Institute of Internal Auditors, Nashville Chapter, Brentwood, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (12/6/2018)

2018-2019: Nashville Electric Service, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (11/28/2018)

2018-2019: East Tennessee AGA Chapter - 2018 Fall Training Conference, Knoxville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (11/15/2018)

2018-2019: Joint Meeting of the Chattanooga Chapters of the Tax Practitioners and the IIA, Chattanooga, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (11/14/2018)

2018-2019: Joint Meeting of the Chattanooga Chapters of the Tax Practitioners and Institute of Internal Auditors, Chattanooga, Tennessee. Corporate Governance: Lessons for Auditors (11/14/2018)

2018-2019: Deloitte, Franklin, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (11/13/2018)

2018-2019: Carr, Riggs, and Ingram, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (11/8/2018)

2018-2019: Ingram Industries, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (10/31/2018)

2018-2019: Tennessee Society of CPAs - Nashville Chapter, Franklin, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (10/16/2018)

2018-2019: Tennessee Government Finance Officers Association 2018 Fall Conference, Murfreesboro, Tennessee. Your Cheatin Heart: Lessons in Ethics (10/11/2018)

2018-2019: Institute of Internal Auditors East Tennessee Chapter, Knoxville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (9/20/2018)

2018-2019: Institute of Internal Auditors Memphis Chapter, Memphis, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (9/6/2018)

2018-2019: Crosslin CPAs, Nashville, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (8/6/2018)

2018-2019: American Association of State Highway Transportation Officials 2018 Internal/External Audit Subcommittee Annual Meeting, Nashville, Tennessee. Your Cheatin' Heart - Lessons on Ethics (7/17/2018)

2017-2018: Tax Executives Institute - Nashville Chapter, Franklin, Tennessee. Standards for Tennessee CPAs - State Specific Ethics (5/16/2018)

2017-2018: Tennessee Healthcare Financial Management Association 2018 Spring Institute, Franklin, Tennessee. Standards for Tennessee CPAs: State Specific Ethics (5/10/2016)

2017-2018: Tennessee Society of CPA's - Elk Valley Chapter, Lynchburg, Tennessee. 2018 Standards for Tennessee CPAs: State Specific Ethics (4/26/2018)

2017-2018: HCA Healthcare and Accounting Update 2017, Nashville, Tennessee. 2017 Tennessee Ethics - 2 CPE credits (12/14/2017)

2017-2018: Lipscomb University Updating the Professional Accountant, Nashville, Tennessee. 2017 Tennessee Ethics - 2 CPE credits (12/14/2017)

2017-2018: Vaco, Franklin, Tennessee. 2017 Tennessee Ethics - 2 CPE credits (12/7/2017)

2017-2018: Institute of Internal Auditors, Nashville Chapter, Nashville, Tennessee. 2017 Tennessee Ethics - 2 CPE credits (12/5/2017)

2017-2018: Crowe Horwath, Nashville, Tennessee. 2017 Tennessee Ethics - 2 CPE credits (12/1/2017)

2017-2018: Tennessee Society of CPAs - Nashville Chapter, Franklin, Tennessee. 2017 Tennessee Ethics - 2 CPE Credits (11/14/2017)

2017-2018: Deloitte, Franklin, Tennessee. 2017 Tennessee Ethics - 2 CPE Credits (11/14/2017)

2017-2018: Change Healthcare, Donelson, Tennessee. 2017 Tennessee Ethics - 2 CPE credits (10/31/2017)

2017-2018: Tennessee Valley Public Power Association - Accounting and Finance Conference, Knoxville, Tennessee. 2017 Professional Ethics - 1 CPE credit (10/12/2017)

2017-2018: Tennessee Higher Education Internal Auditors Meeting, Murfreesboro, Tennessee. 2017 Tennessee Ethics (10/4/2017)

2017-2018: Tennessee Society of Accounting Educators 33rd Annual Meeting, Brentwood, Tennessee. 1 CPE credit (9/29/2017)

2017-2018: HCA Internal Audit Department, Nashville, Tennessee. 2017 Tennessee Ethics - 2 CPE credits (7/5/2017)

2016-2017: Tax Executives Institute - Nashville Chapter, Franklin, Tennessee. 2017 Tennessee Ethics - 1 CPE credit (5/3/2017)

2016-2017: State of Tennessee, Office of the Comptroller of the Treasury (State Audit), Nashville, Tennessee. 2017 Tennessee Ethics (4/19/2017)

2016-2017: HCA Healthcare and Accounting Update 2016, Nashville, Tennessee. 2016 Tennessee Ethics (12/15/2016)

2016-2017: Lipscomb University Updating the Professional Accountant, Nashville, Tennessee. 2016 Tennessee Ethics (12/15/2016)

2016-2017: Vaco, Franklin, Tennessee. 2016 Tennessee Ethics (12/14/2016)

2016-2017: State of Tennessee, Department of Finance and Administration, Nashville, Tennessee. 2016 Tennessee Ethics (12/12/2016)

2016-2017: Institute of Internal Auditors, Nashville Chapter, Nashville, Tennessee. 2016 Tennessee Ethics (12/7/2016)

2016-2017: Crowe Horwath, Franklin, Tennessee. 2016 Tennessee Ethics (12/2/2016)

2016-2017: Tennessee Society of CPAs - 2016 Health Care Conference, Franklin, Tennessee. 2016 Tennessee Ethics (11/28/2016)

2016-2017: Tennessee Society of CPAs - 2016 Tennessee Federal Tax Conference, Franklin, Tennessee. 2016 Tennessee Ethics (11/16/2016)

2016-2017: Tennessee Society of CPAs - Nashville Chapter, Franklin, Tennessee. 2016 Tennessee Ethics (11/15/2016)

2016-2017: Deloitte, Franklin, Tennessee. 2016 Tennessee Ethics (11/15/2016)

2016-2017: FDH Consulting/FEI Nashville Chapter, Nashville, Tennessee. 2016 Tennessee Ethics (11/11/2016)

2016-2017: Chattanooga Tax Practitioners, Chattanooga, Tennessee. 2016 Tennessee Ethics (11/2/2016)

2016-2017: Institute of Internal Auditors Memphis Chapter, Memphis, Tennessee. 2016 Professional Ethics - 2 CPE credits (9/15/2016)

2016-2017: National Franchise Consultants & Accountants (NFCA), Nashville, Tennessee. 2016 Annual Meeting - Professional Ethics - 2 CPE credits (9/09/2016)

2015-2016: Tennessee Society of CPA's - Memphis Chapter, Memphis, Tennessee. Corporate Governance - 1 CPE credit (8/11/2015)

2015-2016: 2015 ACBSP Annual Conference, Philadelphia, Pennsylvania. Teaching Excellence - ACBSP Honor Societies (6/14/2015)

2015-2016: Tennessee Society of CPAs - West Tennessee Chapter, Jackson, Tennessee. 2016 Tennessee Ethics - 2 CPE credits (5/25/2016)

2015-2016: Tax Executives Institute - Nashville Chapter, Franklin, Tennessee. 2016 Tennessee Ethics - 1 CPE credit (5/5/2016)

2015-2016: Tennessee Society of CPA's - Elk Valley Chapter, Lynchburg, Tennessee. 2016 Tennessee Ethics and 2015/16 General Audit Risk Alert - 4 CPE credits (4/29/2016)

2015-2016: Tennessee Electric Cooperative Association (TECA) Accountants' Conference, Nashville, Tennessee. 2016 Tennessee Ethics - 2 CPE credits (4/22/2016)

2015-2016: State of Tennessee, Office of the Comptroller of the Treasury (State Audit), Nashville, Tennessee. 2016 Tennessee Ethics - 1 CPE credit (4/20/2016)

2015-2016: Lipscomb University Updating the Professional Accountant, Nashville, Tennessee. 2015 Tennessee Ethics - 2 CPE Credits (12/17/2015)

2015-2016: Crowe Horwath, Franklin, Tennessee. 2015 Tennessee Ethics - 2 CPE credits (12/10/2015)

2015-2016: Institute of Internal Auditors, Nashville Chapter, Nashville, Tennessee. 2015 Tennessee Ethics - 2 CPE credits (12/8/2015)

2015-2016: Vaco, Franklin, Tennessee. 2015 Tennessee Ethics - 2 CPE credits (12/8/2015)

2015-2016: Tennessee Society of CPA's - 2015 Tennessee Federal Tax Conference, Franklin, Tennessee. 2015 Tennessee Ethics - 2 CPE credits (11/18/2015)

2015-2016: Deloitte, Franklin, Tennessee. 2015 Tennessee Ethics - 2 CPE credits (11/12/2015)

2015-2016: Estate Planning Council - Chattanooga Chapter, Chattanooga, Tennessee. 2015 Tennessee Ethics - 1 CPE credit (10/22/2015)

2015-2016: Tennessee Society of CPAs - Nashville Chapter, Nashville, Tennessee. 2015 Tennessee Ethics (3 hours) and Lessons Learned from Service on a Non-Profit Board (1 hour) - 10/20/2015

2015-2016: Frasier, Dean & Howard CPAs, Nashville, Tennessee. 2015 Tennessee Ethics - 2 CPE credits (9/11/2015)

2015-2016: Institute of Internal Auditors Memphis Chapter, Memphis, Tennessee. 2015 Tennessee Ethics - 2 CPE credits (9/10/2015)

2014-2015: Institute of Internal Auditors, Nashville Chapter, Nashville, Tennessee. 2014 Tennessee Ethics - 2 CPE credits

2014-2015: Institute of Internal Auditors East Tennessee Chapter, Knoxville, Tennessee. 2014 Tennessee Ethics - 2 CPE credits (10/30/2014)

2014-2015: 2014 ACBSP Annual Conference, Chicago, Illinois. Teaching and Recognizing Excellence Through Delta Mu Delta

2013-2014: Institute of Internal Auditors, Nashville Chapter, Nashville, Tennessee. 2013 Tennessee Ethics - 2 CPE credits

2013-2014: Institute of Internal Auditors Memphis Chapter, Memphis, Tennessee. 2013 Tennessee Ethics - 2 CPE credits

2013-2014: Institute of Internal Auditors East Tennessee Chapter, Knoxville, Tennessee. 2013 Tennessee Ethics - 2 CPE credits

2013-2014: National Restaurant Association Internal Audit Executive Study Group. Professional Ethics - 2 CPE credits

2012-2013: Institute of Internal Auditors Memphis Chapter, Memphis, Tennessee. 2012 Tennessee Ethics - 2 CPE credits

2012-2013: Institute of Internal Auditors, Nashville Chapter, Nashville, Tennessee. 2012 Tennessee Ethics - 2 CPE credits

2012-2013: Institute of Internal Auditors East Tennessee Chapter, Knoxville, Tennessee. 2012 Tennessee Ethics - 2 CPE Credits

2011-2012: Institute of Internal Auditors, Nashville Chapter, Franklin, Tennessee. 2011 Professional Ethics - 2 CPE credits

2011-2012: Tennessee Society of CPAs 2011 Healthcare Conference, Franklin, Tennessee. 2011 Professional Ethics - 1 CPE credit

2011-2012: Institute of Internal Auditors Memphis Chapter, Memphis, Tennessee. 2011 Professional Ethics - 4 CPE Credits

2011-2012: Institute of Internal Auditors East Tennessee Chapter, Knoxville, Tennessee. 2011 Professional Ethics - 2 CPE credits

2011-2012: Tennessee Society of CPAs 2011 Young CPAs Conference, Franklin, Tennessee. 2011 Professional Ethics - 2 CPE credits

2011-2012: Tennessee Society of CPAs 2011 Governmental A&A Conference, Nashville, Tennessee. Professional Ethics - 1 CPE credit

2011-2012: NASBA CPE Conference, San Diego, California. Presented 'Self Study Best Practices' as a pre-conference workshop at the 2011 CPE Conference

2010-2011: Tennessee Society of CPA's 2010 Healthcare Conference, Franklin, Tennessee. Professional Ethics - 1 CPE credit

2010-2011: Tennessee Society of CPA's 80th Annual Meeting and Leadership Conference, Chattanooga, Tennessee. Professional Ethics - 2 CPE credits

2010-2011: Tennessee Society of CPAs 2010 Young CPA's Conference, Nashville, Tennessee. Professional Ethics - 2 CPE credits

2010-2011: Tennessee Society of CPA's High School Educator's Symposium. Explore the Profession

2009-2010 – 2010-2011: Institute of Internal Auditors Memphis Chapter, Memphis, Tennessee. Professional Ethics - 4 CPE credits

2008-2009 – 2010-2011: Institute of Internal Auditors East Tennessee Chapter, Knoxville, Tennessee. Professional Ethics - 2 CPE credits

2007-2008 – 2010-2011: Institute of Internal Auditors, Nashville Chapter, Franklin, Tennessee. Professional Ethics - 2 CPE credits

2009-2010: NASBA CPE Conference, Jacksonville, Florida. Understanding the Self-Study Delivery Method - 50 minutes

2009-2010: Tennessee Society of CPA's High School Educator's Symposium. Start Going Places: an Overview of TSCPA/AICPA Resources - 1 hour

2008-2009: Tennessee Society of CPA's High School Educator's Symposium. Financial Literacy - 3 hours  
2008-2009: TrustCore Seminar. Professional Ethics - 1 CPE credit  
2008-2009: Institute of Internal Auditors Memphis Chapter, Memphis, Tennessee. Professional Ethics - 2 CPE credits  
2008-2009: Institute of Internal Auditors Chattanooga Chapter, Chattanooga, Tennessee. Professional Ethics - 2 CPE credits  
2007-2008: Conclave and Professional Conference. Overview of and Careers in the Accounting Industry - 60 minutes  
2007-2008: Tennessee Society of CPA's High School Educator's Symposium. TSCPA Programs and Initiatives - 30 minutes  
2007-2008: Symbion. Professional Ethics - 2 CPE credits  
2006-2007: Tennessee Society of CPA's High School Educator's Symposium. TSCPA Accounting Academy - 30 minutes  
2005-2006: Vanderbilt University Virtual School. web presentation on Career Conversations: Careers in Business Management - two 45-minute webcasts  
2005-2006: NASBA CPE Conference, New Orleans, Louisiana. Administering the Registry and QAS Programs - 120 minutes  
2005-2006: TrustCore Seminar. Ethics and Independence - 1 CPE

#### **Reviewer: Conference Paper**

2019-2020: MBAA International. Reviewer for 2020 MBAA International Conference  
2019-2020: 2019 CBFA Annual Conference. Reviewer of 3 papers submitted to the 2019 CBFA Annual Conference: "Changing Business, Unchanging Faith: A Call for Whole Person Development"

### **Service to the Community**

#### **Other Community Service Activities**

2018-2019 – 2020-2021: Brentwood Hills Church of Christ: MIissions Team - Lead Deacon, I am a deacon at Brentwood Hills Church of Christ and serve as Lead Deacon on the Missions Team. I am the financial controller for the team and serve on its Executive Committee.  
2019-2020: Mission Trip - Tegucigalpa, Honduras  
2019-2020: Mission Trip - Cucuta, Colombia  
2018-2019: 2019 Lipscomb University Day of Service  
2013-2014 – 2017-2018: Brentwood Hills Church of Christ: Deacon with service as financial controller for the Missions Team, I am a deacon at Brentwood Hills Church of Christ and serve on the Missions Team. I am the financial controller for the team and serve on its Executive Committee.  
2008-2009 – 2014-2015: Faith Builders' Class Chair, Brentwood Hills Church of Christ, My wife and I serve as class chairs for the Faith Builders' class. We maintain the attendance roster and distribute all email communication for the class.

### **Faculty Development**

#### **Assurance of Learning - Professional Development**

2021-2022: Lipscomb University Office for Institutional Effectiveness and Accreditation. Continuous Improvement Workshop (7/7/2021)  
2020-2021: AACSB: Assurance of Learning Seminar 1. Foundations and Fundamentals (June 8-10, 2020)  
2018-2019: Lipscomb University College of Business Brown Bag. Advising (2/26/2019)  
2017-2018: CAPSIM webcast. Assessing and Developing Ethical Decision Making Skills (2/22/2018)  
2016-2017: 2016 ACBSP Annual Conference. Creating New Knowledge in the Classroom (June 17-19, 2016)  
2015-2016: Lipscomb University. Faculty Development Process Discussion (2/10/2016)  
2015-2016: 2015 ACBSP Annual Conference. Partnering with Business for Student Success - Integrating the Boardroom into the Classroom (June 12-15, 2015)  
2014-2015: 2014 ACBSP Annual Conference. Engaged Learning in the Digital Age (June 27-29, 2014)  
2012-2013: 2012 ACBSP Annual Conference. Sustaining Excellence Through Quality Business Education (6/15-18/12)  
2004-2005: AACSB Assessment Seminar.

#### **DS: Research-Related Conference/Seminar**

2019-2020: 41st Annual Case Writers Workshop: Society for Case Research and Global Jesuit Case Series. Critical Incident Writer's Workshop (7/25-27/2019)  
2018-2019: Lipscomb University College of Business Brown Bag. Building a Scholarship Pipeline (1/22/2019)  
2017-2018: Lipscomb University. Faculty Meeting - Impact of Research on Students (2/08/2018)  
2013-2014: 2013 Christian Scholars' Conference. Crises in Ethics (6/6-7/13)



### **Instructional-Related Conference**

- 2021-2022: AICPA/NASBA/AAA CPA Evolution Model Curriculum Launch. CPA Evolution Model Curriculum Launch (June 15-16, 2021)
- 2021-2022: ACBSP Region 3 Business Meeting. Summer 2021 Business Meeting (6/10/2021)
- 2020-2021: Lipscomb University Center for Teaching and Learning. Renew Conference: Converging to Reaffirm, Reawaken, and Regenerate Effective Teaching and Learning in Higher Education (5/11/2021)
- 2020-2021: American Accounting Association Webcast. **Insights into Critical Audit Matters (CAMs) (4/30/2021)**
- 2020-2021: American Accounting Association Webcast. **EYARC Ethics Mindset Curriculum (4/23/2021)**
- 2020-2021: Lipscomb University Center for Teaching and Learning. CTL Book Club: Connected Teaching Part 3 (3/24/2021)
- 2020-2021: Lipscomb University Center for Teaching and Learning. CTL Book Club: Connected Teaching Part 2 (2/24/2021)
- 2020-2021: Lipscomb University Center for Teaching and Learning. CTL Book Club: Connected Teaching Part 1 (2/3/2021)
- 2020-2021: Harvard Business School Webcast. Making Online Classrooms Work for You and Your Students (11/19/2020)
- 2020-2021: American Institute of CPAs Webcast. Higher-Level Accounting Courses: How to Help Your Students Become Better Critical Thinkers (10/30/2020)
- 2020-2021: ACBSP Region 3 Conference. Developing Business Leaders for a Better Tomorrow (10/22-23/2020)
- 2020-2021: Tennessee Society of Accounting Educators 36th Annual Meeting. TSAE 36th Annual Meeting (9/25/2020)
- 2020-2021: NASBA National Registry eSummit. Training. Technology. Together. (9/22/2020)
- 2020-2021: Lipscomb University College of Business Brown Bag. Fall Teaching Tips: Campus Nexus (8/11/2020)
- 2020-2021: Lipscomb University Center for Teaching and Learning. CTL LipscombFlex Session Fall 2020 (8/10/2020)
- 2020-2021: Lipscomb University Center for Teaching and Learning. CTL July Book Club: Small Teaching Online Part 2 (7/28/2020)
- 2020-2021: Lipscomb University Center for Teaching and Learning. CTL July Book Club: Small Teaching Online Part 1 (7/14/2020)
- 2019-2020: Lipscomb University Center for Teaching and Learning. Applying Cognitive Science to Online Teaching & Learning Strategies (5/20/2020)
- 2019-2020: Lipscomb University Center for Teaching and Learning. Building Community in Your Online Courses (5/19/2020)
- 2019-2020: Lipscomb University Center for Teaching and Learning. Engaging Students in Your Online Courses (5/14/2020)
- 2019-2020: Lipscomb University Center for Teaching and Learning. Designing & Organizing Your Online Courses (5/13/2020)
- 2019-2020: Harvard Business School Webcast. **Live Webinar: Deep Dive Into Case Teaching Online (4/21/2020)**
- 2019-2020: American Accounting Association Webcast. Are you ready for remote learning? Tips and technology tools to shift your lecture courses online (3/20/2020)
- 2019-2020: Harvard Business School Webcast. Adapting Quickly to Teaching Online (3/19/2020)
- 2019-2020: Lipscomb University Center for Teaching and Learning. CTL Book Club: Generation Z Learns, Part 2 (2/26/2020)
- 2019-2020: Lipscomb University College of Business Brown Bag. CTL Gives a Canvas Update (1/28/2020)
- 2019-2020: Lipscomb University Center for Teaching and Learning. Small Changes, Big Results (1/22/2020)
- 2019-2020: Lipscomb University Center for Teaching and Learning. Intentional Technology: Strategies for Inclement Weather (1/15/2020)
- 2019-2020: Lipscomb University Center for Teaching and Learning. What's In Your Syllabus (11/20/2019)
- 2019-2020: Lipscomb University Center for Teaching and Learning. Learning from Academic Dishonesty (11/13/2019)
- 2019-2020: Lipscomb University Center for Teaching and Learning. Everyone Has Value: You and Your Students (10/9/2019)
- 2019-2020: Tennessee Society of Accounting Educators 35th Annual Meeting. TSAE 35th Annual Meeting (9/27/2019)
- 2019-2020: Lipscomb University College of Business Brown Bag. Academic Integrity (9/24/2019)
- 2019-2020: Lipscomb University Center for Teaching and Learning. Introduction to Panopto (8/5/2019)
- 2019-2020: 2019 ACBSP Annual Meeting. The Art of Developing Entrepreneurial Leaders (6/21-22/2019)
- 2018-2019: Lipscomb University Center for Teaching and Learning. Terms of Engagement: Understanding and Promoting Student Engagement (5/6/2019)
- 2018-2019: Lipscomb University College of Business Brown Bag. Teaching Seminar - Engaging Students (4/26/2019)
- 2018-2019: Lipscomb University Center for Teaching and Learning. Dynamic Lecturing - Chapter 9 (3/6/2019)
- 2018-2019: Lipscomb University College of Business Brown Bag. Teaching Skills - Blocking and Tackling Part A (3/5/2019)
- 2018-2019: Lipscomb University College of Business Brown Bag. Internships (2/12/2019)
- 2018-2019: Lipscomb University Center for Teaching and Learning. Dynamic Lecturing - Chapter 8 (2/6/2019)

2018-2019: Lipscomb University Center for Teaching and Learning. Canvas Gradebook (1/9/2019)

2018-2019: ACBSP Region 3 Conference. The Art of Developing Entrepreneurial Leaders (10/19 to 10/21/2018)

2018-2019: Lipscomb University Center for Teaching and Learning. Dynamic Lecturing - Chapter 6 (10/17/2018)

2018-2019: 2018 Blockchain Technology: An Emerging Issues Forum. American Accounting Association: 2018 Blockchain Technology - An Emerging Issues Forum (9/13-14, 2018)

2018-2019: Lipscomb University Center for Teaching and Learning. Dynamic Lecturing - Review of Chapters 1-4 (9/5/2018)

2018-2019: MindBridge Webinar. Eight Ways that MindBridge Ai Auditor is Revolutionizing Financial Auditing (7/26/2018)

2018-2019: American Accounting Association Webcast. Lessons Learned from Teaching Graduate Auditing Courses (6/19/2018)

2018-2019: 2018 ACBSP Annual Conference. Transforming Student Success Through Recruitment, Retention, and Re-Entry (6/8 to 6/9/2018)

2017-2018: Lipscomb University Center for Teaching and Learning. Canvas Best Practices (5/9/2018)

2017-2018: Lipscomb University Center for Teaching and Learning. Canvas Tools/Advanced Topics (5/9/2018)

2017-2018: Lipscomb University Center for Teaching and Learning. Blackboard to Canvas (5/7/2018)

2017-2018: Lipscomb University Center for Teaching and Learning. Introduction to Canvas (5/7/2018)

2017-2018: Lipscomb University Center for Teaching and Learning. Building a Course in Canvas (4/20/2018)

2017-2018: Lipscomb University Center for Teaching and Learning. Canvas Introduction (4/20/2018)

2017-2018: Ayers Institute for Teaching Learning and Innovation - Lipscomb University. Teaching and Learning in the Classroom: Reflective Feedback (4/4/2018)

2017-2018: Lipscomb University Center for Teaching and Learning. Dynamic Lecturing - Part 3 (3/07/2018)

2017-2018: Ayers Institute for Teaching Learning and Innovation - Lipscomb University. Teaching and Leading Series: Presuming Positive Intent (2/28/2018)

2017-2018: Lipscomb University Center for Teaching and Learning. Effective Teaching in the Classroom Part 4 (11/29/2017)

2017-2018: Lipscomb University Center for Teaching and Learning. Blockchain Technology (11/15/2017)

2017-2018: Ayers Institute for Teaching Learning and Innovation - Lipscomb University. Teaching and Leading Series: Committed Listening and Witnessing the Struggle (11/8/2017)

2017-2018: ACBSP Region 3 Conference. Transforming Student Success Through Recruitment, Retention, and Reentry (10/26 - 10/28/2017)

2017-2018: Lipscomb University Center for Teaching and Learning. Effective Teaching in the Classroom Part 3 (10/18/2017)

2017-2018: Ayers Institute for Teaching Learning and Innovation - Lipscomb University. Teaching and Leading Series: Trusting Others' Unique Potential (10/11/2017)

2017-2018: Lipscomb University SALT and LIGHT Center. General Education, SALT, LIGHT, and the Writing Studio (10/10/2017)

2017-2018: Tennessee Society of Accounting Educators 33rd Annual Meeting. TSAE 33rd Annual Meeting (9/29/2017)

2017-2018: Lipscomb University Center for Teaching and Learning. Effective Teaching in the Classroom Part 2 (9/13/2017)

2017-2018: 2017 Accounting is Big Data Conference. American Accounting Association's "Accounting is Big Data Conference" 9/07-08/2017

2017-2018: Lipscomb University Center for Teaching and Learning. Effective Teaching in the Classroom Part 1 (8/30/2017)

2017-2018: American Accounting Association Webcast. An Overview of Analytics Mindset Competencies (6/07/2017)

2017-2018: American Accounting Association Webcast. How Digitization of Business is Redefining Financial Reporting (6/6/2017)

2016-2017: Lipscomb University Center for Teaching and Learning - Teaching Naked. Day with Jose Bowen (5/8/2017)

2016-2017: Lipscomb University Center for Teaching and Learning - Teaching Naked. Parts 9 - 11 (4/19/2017)

2016-2017: American Accounting Association Webcast. Teaching Data Analytics and Visualization (3/24/2017)

2016-2017: Peregrine Academic Services Webcast. Write & Cite: Academic Writing Readiness Course Guide (4/5/2017)

2016-2017: Lipscomb University Center for Teaching and Learning - Teaching Naked. Part 8 (3/29/2017)

2016-2017: Lipscomb University Center for Teaching and Learning - Teaching Naked. Part 7 (3/8/2017)

2016-2017: Lipscomb University Center for Teaching and Learning - Teaching Naked. Part 6 (2/22/2017)

2016-2017: Lipscomb University Center for Teaching and Learning - Teaching Naked. Part 5 (1/25/2017)

2016-2017: Lipscomb University Center for Teaching and Learning - Teaching Naked. Part 4 (11/9/2016)

2016-2017: Cambridge Business Publishers Webcast. Alpine Cupcakes WebEx (10/27/2016)

2016-2017: ACBSP Region 3 Conference. Preparing Students for Career Success (10/6 to 10/8/16)

2016-2017: Tennessee Society of Accounting Educators 32nd Annual Meeting. 32nd Annual Meeting (9/30/2016)  
2016-2017: Lipscomb University Center for Teaching and Learning - Teaching Naked. Part 2 (9/14/2016)  
2016-2017: Lipscomb University Center for Teaching and Learning - Teaching Naked. Part 1 (8/31/2016)  
2016-2017: Lipscomb University Opening Faculty Meeting. 2016 Faculty Meeting (8/18/2016)  
2015-2016: American Accounting Association Webcast. Big Data Webinar: Data Analytics in Auditing and Auditing Education (4/11/2016)  
2015-2016: American Accounting Association Webcast. Effective Learning Through Cases: The Deloitte Foundation Trueblood Case Study Series (2/26/2016)  
2015-2016: American Accounting Association Webcast. Big Data Webinar: How to Get Up and Running on Tableau Painlessly (10/27/2015)  
2015-2016: ACBSP Region 3. 2015 ACBSP Region 3 Fall Conference: Creating New Knowledge in the Classroom (Oct 1-3, 2015)  
2015-2016: Tennessee Society of Accounting Educators. 31st Annual Meeting (9/25/2015)  
2014-2015: Tennessee Society of Accounting Educators. 30th Annual Meeting (10/3/14)  
2013-2014: Tennessee Society of Accounting Educators. 30th Annual Meeting (10/4/13)  
2013-2014: AACSB Teaching Effectiveness Seminar. Hosted at Lipscomb University  
2012-2013: Tennessee Society of Accounting Educators. 29th Annual Meeting (9/28/12)  
2011-2012: Tennessee Society of Accounting Educators. 28th Annual Meeting (9/23/11)  
2011-2012: McGraw-Hill Course Resource Webinar.  
2010-2011: Tennessee Society of Accounting Educators. 27th Annual Meeting  
2009-2010: Tennessee Society of Accounting Educators. 26th Annual Meeting  
2008-2009: Tennessee Society of Accounting Educators. 25th Annual Meeting  
2007-2008: Deloitte's Southeast Faculty Symposium.  
2007-2008: Tennessee Society of Accounting Educators. 24th Annual Meeting  
2006-2007: Tennessee Society of Accounting Educators. 23rd Annual Meeting  
2006-2007: AACSB Faculty Conference on Learning.  
2005-2006: Tennessee Society of Accounting Educators. 22nd Annual Meeting  
2004-2005: Tennessee Society of Accounting Educators. 21st Annual Meeting

### **Other Professional Development**

2021-2022: PricewaterhouseCoopers Webcast. PwC's Q2 2021 Quarterly Accounting Webcast (6/29/2021)  
2021-2022: Tennessee Society of CPAs Webcast. New SASs for 2020 Reporting (6/28/2021)  
2021-2022: Tennessee Society of CPAs Webcast. SSARS, SSAE, and other AICPA Professional Standards Update (6/28/2021)  
2021-2022: Tennessee Society of CPAs. TSCPA 90th Annual Meeting and Convention (6/15-16/2021)  
2021-2022: Grant Thornton Webcast. Fraud and Abuse in the Paycheck Protection Program (1/28/2021)  
2020-2021: Institute of Internal Auditors, Nashville Chapter. Creating an Inclusive Internal Audit Department (5/20/2021)  
2020-2021: Grant Thornton Webcast. Internal Audit's Role in Establishing An Effective Cloud Security Program (4/1/2021)  
2020-2021: PricewaterhouseCoopers Webcast. PwC's Q1 2021 Quarterly Accounting Webcast (3/17/2021)  
2020-2021: Institute of Internal Auditors, Nashville Chapter. Internal Audit Transformation (2/23/2021)  
2020-2021: CRI Webcast. Gone Phishing: Don't Fail the Test Against Social Engineering (2/3/2021)  
2020-2021: ACBSP. The CPA Evolution and Accounting Model Curriculum (1/25/2021)  
2020-2021: Lipscomb University College of Business Brown Bag. Navigating Difficult Diversity, Equity, and Inclusion Conversations (1/22/2021)  
2020-2021: Institute of Internal Auditors Webcast. The State of Corporate Governance and Opportunities for Internal Audit (1/19/2021)  
2020-2021: Institute of Internal Auditors Webcast. Emerging Fraud Risks (1/13/2021)  
2020-2021: Lipscomb University Updating the Professional Accountant. 40th Annual Updating the Professional Accountant (12/7-15/2020)  
2020-2021: Tennessee Society of CPAs - Nashville Chapter. November Chapter Meeting (11/24/2020)  
2020-2021: KeyBank Webcast. Fraud Activities Post COVID-19 & How to Protect your Organization (10/29/2020)  
2020-2021: CRI Webcast. Gone Phishing: Defending your Organization Against Social Engineering (10/6/2020)

2020-2021: PricewaterhouseCoopers Webcast. PwC's Q3 2020 Quarterly Accounting Webcast (9/16/2020)

2020-2021: Institute of Internal Auditors Webcast. Cracking The Decency Code, The Leader's Path to Integrity and Trust (9/15/2020)

2020-2021: Tennessee Society of CPAs Webcast. Standards for Tennessee CPAs: State Specific Ethics (7/24/2020)

2020-2021: Institute of Internal Auditors Webcast. The Role of Internal Audit in Fraud Prevention (7/21/2020)

2020-2021: Institute of Internal Auditors, Nashville Chapter. Staying Power (7/14/2020)

2020-2021: Institute of Internal Auditors Webcast. Data Breach Response (7/9/2020)

2020-2021: PricewaterhouseCoopers Webcast. PwC's Q2 2020 Quarterly Accounting Webcast (6/29/2020)

2020-2021: Institute of Internal Auditors, Nashville Chapter. How Recent COSO Guidance Impacts Internal Auditors in a Transformational World (6/26/2020)

2020-2021: KPMG Board Leadership Webcast. 2020 Proxy season hot topics – including COVID-19 implications (6/18/2020)

2020-2021: KPMG TaxWatch Webcast. Lessons Learned from Recent Information Reporting Season: Preparing for Next Year (6/16/2020)

2019-2020: Institute of Internal Auditors Webcast. Social Distancing and Internal Audit (4/1/2020)

2019-2020: Deloitte Webcast. COVID-19: Accounting and Reporting Implications of the Outbreak (3/30/2020)

2019-2020: PricewaterhouseCoopers Webcast. Q1 2020 Quarterly Accounting Webcast on the Financial Reporting Impacts of the COVID-19 Outbreak (3/18/2020)

2019-2020: Deloitte Webcast. Digital Forensics in the Cloud: A New Dimension in Legal Discovery (2/27/2020)

2019-2020: Deloitte Webcast. Cybersecurity on the front lines: A call to action (2/13/2020)

2019-2020: Lipscomb University Center for Teaching and Learning. CTL Book Club: Generation Z Learns, Part 1 (1/29/2020)

2019-2020: Deloitte Webcast. How large-scale, resilient organizations thrive in a complex world (1/15/2020)

2019-2020: Lipscomb University Updating the Professional Accountant. 39th Updating the Professional Accountant (12/9-12/13, 2019)

2019-2020: Tennessee Society of CPAs - Nashville Chapter. Nashville Chapter November Meeting (11/12/2019)

2019-2020: Deloitte. Trends and Transformation: Deloitte's Annual CPE Event (11/6/2019)

2019-2020: Tennessee Society of CPAs - Nashville Chapter. Nashville Chapter October Meeting (10/22/2019)

2019-2020: Tennessee Society of CPAs - Nashville Chapter. Nashville Chapter September Meeting and Student Night (9/19/2019)

2019-2020: Deloitte Webcast. The Evolution to a Tech-Savvy Board (9/26/2019)

2019-2020: Deloitte Webcast. Quarterly Accounting Roundup: Q3 2019 Update on Important Developments (9/24/2019)

2019-2020: Deloitte Webcast. The Future of Risk in the Digital Era (7/23/2019)

2019-2020: Institute of Internal Auditors Webcast. The Internal Audit/Audit Committee Relationship (7/16/19)

2019-2020: PricewaterhouseCoopers Webcast. Q2 2019 Current Accounting and Reporting Developments (6/25/2019)

2019-2020: Institute of Internal Auditors Webcast. Code of Ethics (6/18/2019)

2019-2020: Tennessee Society of CPAs 89th Annual Meeting and Convention. 89th Annual Meeting and Convention (6/10-11/2019)

2019-2020: Tennessee Society of CPAs - Council Meeting. Regular Council Meeting (6/9/2019)

2019-2020: Deloitte Webcast. The Future of Work: A Path to Reimagining the Possibilities (5/28/2020)

2018-2019: Deloitte Webcast. The Internet of Things and Cybersecurity (5/30/2019)

2018-2019: Institute of Internal Auditors, Nashville Chapter. ERM at the Tennessee Valley Authority (5/20/2019)

2018-2019: Lipscomb University Dean Institute for Corporate Governance and NACD. Two Sides of a Coin: Landing a Board Seat and Finding the Right Director for your Board (5/14/2019)

2018-2019: Federal Bureau of Investigation. Run, Hide, or Fight: How to Deal with an Active Shooter Situation (5/9/2019)

2018-2019: Nashville IIA Internal Audit Symposium. Emerging Audit Issues Roundtable (4/25/2019)

2018-2019: Institute of Internal Auditors, Nashville Chapter. Intelligent Automation (3/25/2019)

2018-2019: Deloitte Webcast. Reframing Financial Crime in the Art Market: A New Picture Emerges (3/6/2019)

2018-2019: Deloitte Webcast. Resilience and the board (2/19/2019)

2018-2019: Institute of Internal Auditors, Nashville Chapter. Audit and Investigation Tools Luncheon (2/05/2019)

2018-2019: Deloitte Webcast. Risk and Controls Innovation: A Smarter Way Forward (2/6/2019)

2018-2019: 2019 ACBSP Council of Regional Chairs Mid-Year Meeting. Attended as Region 3's representative (1/18-19/2019)

2018-2019: Lipscomb University Updating the Professional Accountant. 38th Updating the Professional Accountant (Dec 10-14, 2018)

2018-2019: Deloitte Webcast. 2019 Board and Committee Agenda: Something old, something new? (11/29/2018)

2018-2019: Deloitte Webcast. SEC Hot Topics: Year End Update (11/8/2018)

2018-2019: Institute of Internal Auditors, Nashville Chapter. Internal Audit Investigations (9/28/2018)

2018-2019: PricewaterhouseCoopers Webcast. Preparing for the New Auditor's Reporting Model (9/25/2018)

2018-2019: Deloitte Webcast. FCPA Enforcement: Lessons learned from a year under the new policy (9/17/2018)

2018-2019: Institute of Internal Auditors Webcast. The IIA's Code of Ethics: Exploring Ethical Situations for Internal Auditors (7/26/2018)

2018-2019: Deloitte Webcast. Supply Chain Forensics (7/24/2018)

2018-2019: PricewaterhouseCoopers Webcast. Q2 2018 Current Accounting and Reporting Developments Webcast (6/20/2018)

2018-2019: Deloitte Webcast. Adopting a Resilient Approach to Address Emerging Cyber Threats (6/12/2018)

2017-2018: Deloitte Webcast. Cyber Wargaming (5/31/2018)

2017-2018: Institute of Internal Auditors Webcast. Auditing Culture (5/15/2018)

2017-2018: Institute of Internal Auditors, Nashville Chapter. Cyber Crime (5/8/2018)

2017-2018: Tennessee Society of CPAs - Elk Valley Chapter. Elk Valley Chapter April Meeting (4/26/2018)

2017-2018: Deloitte Webcast. Finding the Right Fit: Becoming Board Ready (4/4/2018)

2017-2018: Deloitte Webcast. Quarterly Accounting Roundup: Q1 2018 Update (3/27/2018)

2017-2018: Institute of Internal Auditors, Nashville Chapter. CAE Roundtable and Lunch Meeting (3/19/2018)

2017-2018: Institute of Internal Auditors, Nashville Chapter. Digital Footprint Analysis and User Administration (2/26/2018)

2017-2018: Tennessee Society of CPAs - Nashville Chapter. February Chapter Meeting (2/13/2018)

2017-2018: NACD Webcast. Engaging Management on the Workforce of the Future (1/25/2018)

2017-2018: Institute of Internal Auditors Webcast. Realistic Security: Counter Advanced Threats with Basic Controls (1/16/2018)

2017-2018: Lipscomb University Updating the Professional Accountant. 37th Updating the Professional Accountant (12/11 to 12/15/2017)

2017-2018: Tennessee Society of CPAs - Nashville Chapter. November Chapter Meeting (11/14/2017)

2017-2018: Tennessee Society of CPAs - Nashville Chapter. 2017 Student Night - Rules of Engagement: Communication Science for CPAs (9/19/2017)

2017-2018: Institute of Internal Auditors Webcast. Auditing and Assessing the State of the Organization's Culture (9/19/2017)

2017-2018: American Institute of CPAs Webcast. Trends in Business Technology (9/14/2017)

2017-2018: Institute of Internal Auditors, Nashville Chapter. Meet Internal Audit CAE's - What Auditors Want to Know (9/5/2017)

2017-2018: Institute of Internal Auditors, Nashville Chapter. Summer Professional Development Seminar (7/26/2017)

2017-2018: Deloitte Webcast. Reputation Matters: Developing Resilience Ahead of Crisis (6/29/2017)

2017-2018: Tennessee Society of CPAs Webcast. Tennessee State Specific Ethics (6/13/2017)

2017-2018: Institute of Internal Auditors. 2017 Leadership Training - Central Region District 4 Workshop (6/9/2017)

2017-2018: Deloitte Webcast. Improving Financial Close, Consolidation, and Reporting Processes (6/01/2017)

2016-2017: Deloitte Webcast. Extended Enterprise Risk Management: New Perspectives on a Growing Imperative (5/25/2017)

2016-2017: Deloitte Webcast. Global Ethics and Compliance in Uncertain Times (5/24/2017)

2016-2017: Tennessee Society of CPAs - Nashville Chapter. May Chapter Meeting (5/16/2017)

2016-2017: Institute of Internal Auditors, Nashville Chapter. Mission Impossible: How Internal Audit Can Enhance and Protect Organizational Value (5/9/2017)

2016-2017: Institute of Internal Auditors, Nashville Chapter. Chief Audit Executives Roundtable (5/9/2017)

2016-2017: PricewaterhouseCoopers Webcast. Governance Insights Center Quarterly Webcast (4/11/2017)

2016-2017: Deloitte Webcast. Modernizing Compliance (3/30/2017)

2016-2017: Tennessee Society of CPAs - Nashville Chapter. March Chapter Meeting (3/21/2017)

2016-2017: Institute of Internal Auditors Webcast. Trusted Advisors (3/28/2017)

2016-2017: Deloitte Webcast. Quarterly Accounting Roundup (3/28/2017)

2016-2017: Institute of Internal Auditors, Nashville Chapter. March Chapter Meeting (3/14/2017)

2016-2017: Institute of Internal Auditors, Nashville Chapter. February Meeting (2/13/2017)

2016-2017: Deloitte Webcast. Becoming Board-Ready: Lessons Learned for Potential Board Candidates (2/9/2017)

2016-2017: PricewaterhouseCoopers Webcast. Governance Insights Center Quarterly Webcast (1/31/2017)

2016-2017: Lipscomb University Updating the Professional Accountant. 36th Year (12/13/2016 through 12/16/2016)

2016-2017: Deloitte Webcast. SEC Hot Topics: Year-End Update (11/9/2016)

2016-2017: Tennessee Society of CPAs - Council Meeting. Regular Council Meeting (11/4/2016)

2016-2017: Crowe Horwath Webinar. FASB Issues New Guidance on Not-for-Profit Financial Reporting (10/25/2016)

2016-2017: Tennessee Society of CPAs Webcast. Standards for Tennessee CPAs: State Specific Ethics (10/19/2016)

2016-2017: Tennessee Society of CPAs - Nashville Chapter. Nashville Chapter Meeting (9/27/2016)

2016-2017: KPMG/NACD Audit Committee Webcast. The Board as a Strategic Asset (9/29/2016)

2016-2017: Institute of Internal Auditors, Nashville Chapter. Using Technology to Unravel Fraud (9/13/2016)

2016-2017: Deloitte Webcast. Cyber Risk Management (8/25/2016)

2016-2017: Deloitte Webcast. 2016 Proxy Season Highlights (7/28/2016)

2016-2017: Institute of Internal Auditors, Nashville Chapter. Summer Break Professional Development Seminar (7/25/2016)

2016-2017: Institute of Internal Auditors Webcast. Maximizing the Value of the "Three Lines of Defense" (7/12/2016)

2016-2017: EY Webcast. Q2 2016 Financial Reporting Update (6/23/2016)

2016-2017: KPMG/NACD Audit Committee Webcast. Financial Reporting Risk Today: Hot Spots and Heightened Scrutiny (6/23/2016)

2016-2017: Institute of Internal Auditors Webcast. The Uncharted Territory of an Organization's Culture (6/21/2016)

2016-2017: Tennessee Society of CPAs - Council Meeting. Regular Council Meeting (6/13/2016)

2015-2016: Deloitte Webcast. Cleaning up intercompany accounting: driving efficiency while managing risk (5/26/2016)

2015-2016: KPMG Advisory Institute Webcast. The Compliance Analytics and Reporting Imperative (5/19/2016)

2015-2016: Deloitte Webcast. Blockchain Revolution: How the technology behind Bitcoin is changing money, business, and the world (5/18/2016)

2015-2016: PricewaterhouseCoopers Webcast. Full Speed Ahead - the Latest on the New Revenue Standard (5/17/2016)

2015-2016: Institute of Internal Auditors Webcast. EHS Auditing: Addressing Risks in a Changing World (5/12/2016)

2015-2016: KPMG/NACD Audit Committee Webcast. 2016 Proxy Season and Beyond - Plus Key Financial Reporting and Governance Developments (3/24/2016)

2015-2016: Deloitte Webcast. Risk Sensing: The Evolving State of the Art (2/10/2016)

2015-2016: Institute of Internal Auditors Webcast. 2016 Industry Outlook (1/20/2016)

2015-2016: Deloitte Webcast. Fraud Risk Assessment (1/20/2016)

2015-2016: KPMG/NACD Audit Committee Webcast. Quarterly Audit Committee Webcast: 2016 Economic Outlook and Year-End Considerations (1/7/2016)

2015-2016: Lipscomb University Updating the Professional Accountant. Lipscomb University's 35th Annual Event (12/14/15 through 12/18/15)

2015-2016: Institute of Internal Auditors, Nashville Chapter. CIO Panel Discussion (11/16/2015)

2015-2016: Institute of Internal Auditors, Learning Solutions Committee. 2015 Mid-Year International Committee Meetings (12/2 to 12/3/2015)

2015-2016: Tennessee Society of CPAs - Nashville Chapter. Nashville Chapter November Meeting (11/17/2015)

2015-2016: 2015 Delta Mu Delta Biennial Conference. 2015 Biennial Conference (11/6 - 11/8/2015)

2015-2016: Deloitte Webcast. Managing Fraud in the Digital Era: Channeling Faint Signals Amid the Noise (9/22/2015)

2015-2016: Institute of Internal Auditors, Nashville Chapter. What Every Internal Auditor Needs to Know About Cyber Crime (9/09/2015)

2015-2016: Deloitte Webcast. 2015 Proxy Season Highlights and Other Corporate Governance Developments (7/30/2015)

2015-2016: American Institute of CPAs Webcast. CFO of the Future (7/23/2015)

2015-2016: KPMG Audit Committee Institute Webcast. KPMG Quarterly Audit Committee Webcast: 2015 Proxy Season Trends (6/25/2015)

2015-2016: Institute of Internal Auditors Webcast. Data Privacy: A High Stakes Issue (7/21/2015)

2015-2016: Institute of Internal Auditors, Nashville Chapter. Member Appreciation Seminar (7/20/2015)

2015-2016: American Institute of CPAs Webcast. Determining Financial Fraud: What Else Can Be Done? (7/16/2015)

2015-2016: PricewaterhouseCoopers Webcast. Center for Board Governance Quarterly Webcast - ProxyPulse 2015 (7/14/2015)

2015-2016: Institute of Internal Auditors, Learning Solutions Committee. 2015 International Conference Committee Meetings; some funding provided by Nashville IIA Chapter [\$1,317.02] (07/8/15 to 07/10/15)

2015-2016: Deloitte Webcast. Quarterly Accounting Roundup: An Update on Important Developments (6/30/2015)

2015-2016: Deloitte Webcast. Enhancing Trust Inside and Out - The Role of the Chief Ethics and Compliance Officer (6/25/2015)

2015-2016: Institute of Internal Auditors Webcast. Guide to Managing the Work-Life Balance of an Audit Team (6/16/2015)

2015-2016: PricewaterhouseCoopers Webcast. Current Accounting and Reporting Developments webcast series Q2 2015 (6/17/2015)

2015-2016: Deloitte Webcast. Reexamining Third-Party Risk: Emerging Practices for Today's Threat Landscape (6/9/2015)

2015-2016: Institute of Internal Auditors. 2015 Central Region District 3 Workshop (6/05/2015)

2014-2015: Deloitte Webcast. Environmental, Social and Governance Performance: Market Developments Regarding Measurement, Disclosures, and Evaluation (5/28/2015)

2014-2015: Institute of Internal Auditors, Nashville Chapter. Making Internal Audit A Strategic Function (5/4/2015)

2014-2015: Tennessee Society of CPAs - Nashville Chapter. "2015 Legislative Update" and "A Deep Dive into How Tennessee Modernized its Revenue" (5/19/2015)

2014-2015: American Institute of CPAs Webcast. From Insight to Impact - Unlocking Opportunities in Big Data Webcast (5/21/2015)

2014-2015: PricewaterhouseCoopers Webcast. Foreign Currency Considerations in Acquisitions and Dispositions (5/18/2015)

2014-2015: Institute of Internal Auditors, Nashville Chapter. Chief Audit Executive's Roundtable (5/4/2015)

2014-2015: KPMG/NACD Audit Committee Webcast. The Shifting Geopolitical Landscape (3/26/2015)

2014-2015: PricewaterhouseCoopers Webcast. Navigating the FASB's new consolidation standard (3/10/2015)

2014-2015: KPMG Audit Committee Institute Webcast. 2015 Economic Outlook and Year-End Considerations (1/8/2015)

2014-2015: Institute of Internal Auditors, Nashville Chapter. Moderator: COSO Update Panel Discussion (11/20/2014)

2014-2015: Institute of Internal Auditors, Nashville Chapter. CISO Panel Discussion (11/17/2014)

2014-2015: Updating the Professional Accountant. Lipscomb University's 34th Annual Event (12/17/14 through 12/19/14)

2014-2015: Ernst & Young. 2014 Financial Reporting and Accounting Update (12/5/2014)

2014-2015: Tennessee Society of CPAs - Nashville Chapter. Nashville Chapter November Meeting (11/18/2014)

2014-2015: Institute of Internal Auditors, Nashville Chapter. Lessons Learned on the Audit Trail - a conversation with Richard Chambers (9/03/2014)

2014-2015: KPMG/NACD Audit Committee Webcast. Cyber-Risk: Five Steps to Strengthen Board Oversight (9/25/14)

2014-2015: Deloitte Webcast. Characteristics of an Exceptional Ethics and Compliance Program (9/25/2014)

2014-2015: Deloitte Webcast. The Boardroom Imperative: Tackling Cyber Risk (9/4/2014)

2014-2015: Institute of Internal Auditors, Nashville Chapter. Chief Audit Executive's Roundtable (9/3/2014)

2014-2015: Institute of Internal Auditors. 2014 Central Region District 3 Workshop (6/18/2014)

2014-2015: Institute of Internal Auditors Webcast. Becoming a More Strategic Internal Auditor webcast (6/17/14)

2014-2015: PricewaterhouseCoopers Webcast. Revenue Recognition: How Revenue Recognition Will Change (6/12/14)

2014-2015: Tennessee Society of CPAs - Nashville Chapter. 2014 Accounting Update (5/22/14)

2014-2015: Institute of Internal Auditors Webcast. Sox, Supreme Court, and Whistleblowing: Compliance and Internal Audit Implications webcast (5/20/14)

2014-2015: Institute of Internal Auditors, Learning Solutions Committee. 2014 Spring Meeting (April 27-29); some funding (\$400+) provided by the IIA Nashville Chapter.

2014-2015: KPMG CFO Financial Forum Webcast. Quarterly Outlook for Accounting and Financial Reporting Matters (3/25/14)

2014-2015: KPMG/NACD Audit Committee Webcast. Cyber Insecurity: How Safe can the Company's Data Assets Be? (3/27/2014)

2014-2015: PricewaterhouseCoopers Webcast. Q1 Current Accounting and Reporting Developments (3/18/14)

2014-2015: PricewaterhouseCoopers Webcast. Center for Board Governance: Key Considerations for Board and Audit Committee Members (1/29/14)

2014-2015: KPMG/NACD Audit Committee Webcast. 2014 Economic Outlook and Year-End Considerations (1/9/14)

2014-2015: Institute of Internal Auditors, Nashville Chapter. Investigative Journalism and the Public Sector (2/3/14)

2014-2015: Institute of Internal Auditors, Nashville Chapter. Chief Audit Executive's Roundtable (2/10/14)

2013-2014: Institute of Internal Auditors, Nashville Chapter. Spring 2013 CAE Roundtable (5/10/13)

2013-2014: Institute of Internal Auditors, Regional Conference Committee. Spring 2013 Regional Conference Committee meeting (4/30 to 5/1/13)

2013-2014: Institute of Internal Auditors, Nashville Chapter. Say It Right - Phil Tarling, Global Chairman of IIA (5/10/13)

2013-2014: Institute of Internal Auditors, Nashville Chapter. SOC Reports (3/12/13)

2013-2014: KPMG/NACD Audit Committee Webcast. Managing Risk for Strategic Value and Competitive Advantage (9/25/13)

2013-2014: KPMG Advisory Institute Webcast. The New Realities of Corruption in the Global Financial Services Environment (9/18/13)

2013-2014: KPMG CFO Financial Forum Webcast. Private Company Developments (9/10/13)

2013-2014: KPMG/NACD Audit Committee Webcast. M&A Readiness - The Board Perspective (6/27/13)

2013-2014: KPMG CFO Financial Forum Webcast. Quarterly Outlook of Accounting and Financial Reporting Matters (6/18/13)

2013-2014: TN Society of CPA's Chattanooga Chapter. Chattanooga Chapter June Meeting (6/13/13)

2013-2014: Deloitte Webcast. The COSO Framework on Internal Control (5/20/13)

2013-2014: KPMG IFRS Institute Webcast. Requirements for First-Time Adoption of IFRS (4/24/13)

2013-2014: PricewaterhouseCoopers Webcast. Year-End Questions for Audit Committees (1/16/13)

2013-2014: KPMG/NACD Audit Committee Webcast. 2013 Economic Outlook and Year-End Considerations (1/10/13)

2013-2014: Updating the Professional Accountant. Lipscomb University (12/19-20/13)

2013-2014: Institute of Internal Auditors, Regional Conference Committee. 2013 Mid-Year Meeting and RCC Committee Meeting (12/10-12/13)

2013-2014: Institute of Internal Auditors, Nashville Chapter. Fraud: Advanced Concepts for Internal Auditors (11/12/13)

2013-2014: 2013 Delta Mu Delta Centennial Meeting. 2013 Biennial Meeting (11/8-10/13)

2013-2014: Institute of Internal Auditors, Nashville Chapter. Risky Business: The Art of Lying, Stealing, and Cheating (9/5/13)

2012-2013: Updating the Professional Accountant. Lipscomb University (12/17/12, 12/19/12, and 12/21/12)

2012-2013: Institute of Internal Auditors, Regional Conference Committee. 2012 Mid-Year Meeting and RCC Committee Meeting (11/27-29/12)

2012-2013: Institute of Internal Auditors, Nashville Chapter. Moderated Chief Audit Executive's Roundtable (6/27/12)

2012-2013: Tennessee Society of CPA's Annual Meeting. 82nd Annual Meeting and Educational Conference (6/10/12)

2012-2013: Tennessee Society of CPAs - Nashville Chapter. 2012 Accounting and Auditing Update (5/15/12)

2012-2013: Institute of Internal Auditors, Regional Conference Committee. 2012 Leadership: Mission Possible and RCC Committee Meeting (4/22-24/12)

2012-2013: 2012 General Audit Managers Conference - Institute of Internal Auditors. The IIA's General Audit Management (GAM) Conference helps to elevate the overall caliber of corporate C-suite professionals by bringing together the most respected practitioners and thought leaders for an unprecedented meeting of the minds. In 2012 the profession's most in-demand and anticipated event will focus on 'Escalating Internal Audit's Influence and Relevance.' (3/19-21/12)

2012-2013: Institute of Internal Auditors, Nashville Chapter. Data Validation (3/8/12)

2012-2013: Institute of Internal Auditors, Nashville Chapter. Cyber Threats - White Collar Crimes (2/15/12)

2012-2013: Tennessee Society of CPAs - Nashville Chapter. Nashville Chapter October Meeting (10/16/12)

2012-2013: PricewaterhouseCoopers Webcast. Center for Board Governance Quarterly Update (9/13/12)

2012-2013: PricewaterhouseCoopers Webcast. Center for Board Governance Quarterly Update (6/28/12)

2012-2013: PricewaterhouseCoopers Webcast. Second Quarter Update (6/20/12)

2012-2013: KPMG CFO Financial Forum Webcast. PCAOB Update and Proposed Changes to COSO's Internal Control Framework (5/14/12)

2012-2013: KPMG/NACD Audit Committee Webcast. Issue Focus: Audit Committee's Interaction with the General Counsel (3/29/12)

2012-2013: KPMG 404 Institute Webcast. Finance Governance Technology (2/22/12)

2011-2012: Updating the Professional Accountant. Lipscomb University (12/23/11)

2011-2012: Ernst and Young Year End Corporate Reporting Update. 2011 Year End Update (12/7/11)

2011-2012: Part-Time MBA Conference. 18th Annual Conference hosted by Temple University's Fox School of Business (10/12-14/11)

2011-2012: Institute of Internal Auditors, Regional Conference Committee. 2011 Mid-Year Meeting and RCC Committee Meeting (11/29/11 to 12/1/11)

2011-2012: Institute of Internal Auditors, Regional Conference Committee. 2011 Destination Leadership and RCC Committee Meeting (4/10-12/11)

2011-2012: Delta Mu Delta. 2011 Biennial Conference (11/4-6/11)

2011-2012: Institute of Internal Auditors, Nashville Chapter. Corporate Governance and ERM (9/6/11)

2011-2012: Institute of Internal Auditors. 2011 Central Region District 3 Workshop (6/8/11)

2011-2012: Tennessee Society of CPAs - Nashville Chapter. 2011 Accounting and Auditing Update (5/17/11)

2011-2012: Institute of Internal Auditors, Nashville Chapter. Social Media's Effects on Internal Auditors (4/6/11)

2011-2012: NASBA CPE Conference. Attended the 2011 CPE Conference. Discussant at two afternoon sessions on self-study



(03/08-9/11)

2011-2012: Institute of Internal Auditors, Nashville Chapter. Winter Chief Audit Executive Roundtable (2/28/11)

2011-2012: KPMG Audit Committee Roundtable Series. Game Changing IT and Other Developments Driving the Agenda (12/6/11)

2011-2012: KPMG CFO Financial Forum Webcast. ASU 2011-08, Testing Goodwill for Impairment (11/16/11)

2011-2012: PricewaterhouseCoopers Webcast. 2011 US IFRS Outlook Survey Results (11/10/11)

2011-2012: KPMG 404 Institute Webcast. Auditing and Monitoring: Critical Activities to Help Detect Fraud (10/19/11)

2011-2012: PricewaterhouseCoopers Webcast. Third Quarter Current Accounting and Reporting Developments (9/14/11)

2011-2012: PricewaterhouseCoopers Webcast. Current Accounting and Reporting Developments (6/21/11)

2011-2012: TN Society of CPA's Chattanooga Chapter. Chattanooga Chapter June Meeting (6/9/11)

2011-2012: KPMG CFO Financial Forum Webcast. Recent Decisions on the Proposed Revenue Recognition Standard (5/16/11)

2011-2012: KPMG IFRS Institute Webcast. Update on the IASB's Revised Targeted Date for Completion of Key Projects (5/2/11)

2011-2012: KPMG/NACD Audit Committee Webcast. First Quarter Update (3/31/11)

2011-2012: PricewaterhouseCoopers Webcast. US GAAP and IFRS Convergence Series webcast (3/15/11)

2011-2012: Institute of Internal Auditors, Nashville Chapter. Disaster Recovery Planning - Lessons Learned (2/8/11)

2011-2012: KPMG/NACD Audit Committee Webcast. Quarterly Update on Financial Reporting, Accounting, and Legal Developments (1/11/11)

2011-2012: Institute of Internal Auditors, Nashville Chapter. 2011 Fraud Seminar (10/4/11)

2010-2011: PricewaterhouseCoopers. various web-based training courses

2010-2011: KPMG. various web-based training courses

2010-2011: Lipscomb University. Updating the Professional Accountant

2010-2011: Institute of Internal Auditors, Nashville Chapter. Profiting from your Tech Investment

2010-2011: Tennessee Society of CPAs - Nashville Chapter. 2010 Accounting and Auditing Update

2010-2011: Lipscomb University. Regional Tax Issues and Developments

2010-2011: Tennessee Society of CPAs. 80th Annual Meeting and Leadership Conference

2010-2011: Ernst and Young Year End Corporate Reporting Update. 2010 Year End Update

2010-2011: Part-Time MBA Conference. 17th Annual Conference hosted by DePaul University's Kellstadt Graduate School of Business

2010-2011: Institute of Internal Auditors, Nashville Chapter. International Financial Reporting Standards

2010-2011: Tennessee Society of CPAs - Nashville Chapter. Things Everyone Should Know About Fraud

2010-2011: Institute of Internal Auditors, Nashville Chapter. Winter Chief Audit Executive's Roundtable

2010-2011: Lipscomb University. Challenges and Opportunities Facing Financial Reporting

2009-2010: 2009 Governance Summit. Fraud, Risk, Ethics & Compliance training

2009-2010: Delta Mu Delta. Biennial Meeting

2009-2010: Institute of Internal Auditors, Nashville Chapter. Fall Chief Audit Director's Roundtable

2009-2010: Part-Time MBA Conference. 16th Annual Conference hosted by University of Texas - Dallas

2009-2010: Institute of Internal Auditors, Nashville Chapter. Enterprise Risk Management - Who's in Charge?

2009-2010: Institute of Internal Auditors, Nashville Chapter. Real Crimes and Update of Identity Crimes

2009-2010: Institute of Internal Auditors, Nashville Chapter. The New International Professional Practices Framework

2008-2009 – 2009-2010: Tennessee Society of CPA's Leadership Conference.

2008-2009 – 2009-2010: Institute of Internal Auditors. Central Region District 4 Workshop

2008-2009: Institute of Internal Auditors, Nashville Chapter. Adding Transactional Analytics to Internal Audit

2008-2009: Institute of Internal Auditors, Nashville Chapter. Chief Audit Director's Roundtable

2008-2009: Institute of Internal Auditors, Nashville Chapter. Listening - Communication Skills

2008-2009: Institute of Internal Auditors, Nashville Chapter. Spring Chief Audit Executive Roundtable

2008-2009: Tennessee Society of CPAs. Accounting Update

2008-2009: Institute of Internal Auditors, Nashville Chapter. Internal Audit's Role in IT System Development

2008-2009: Institute of Internal Auditors, Nashville Chapter. Identity Theft

2008-2009: Director's Forum. Hosted by the Corporate Directors Forum and the University of San Diego

2008-2009: Part-Time MBA Conference. 15th Annual Conference hosted by Pepperdine

2007-2008 – 2008-2009: Institute of Internal Auditors, Nashville Chapter. Chief Audit Director's Roundtable

2007-2008: Lipscomb University. Updating the Professional Accountant

2007-2008: KPMG. Audit Committee Roundtable

2007-2008: Institute of Internal Auditors. 2007 Southeastern Regional Conference

2007-2008: Institute of Internal Auditors, Nashville Chapter. Working with your External Auditor

2007-2008: Institute of Internal Auditors, Nashville Chapter. Chief Audit Director's Roundtable

2007-2008: Director's Forum. Hosted by Corporate Directors Forum and the University of San Diego

2007-2008: Delta Mu Delta. Triennial Meeting

2007-2008: Institute of Internal Auditors. Mid-Atlantic Region District 3 Workshop

2006-2007: Tennessee Society of CPAs. Accounting and Auditing Update

2006-2007: Institute of Internal Auditors, Nashville Chapter. Conducting Effective, Successful Meetings

2006-2007: American Institute of CPAs. Member of the Practice Analysis Review Panel as a subject matter expert to review the CPA exam's content

2006-2007: Institute of Internal Auditors, Nashville Chapter. Business Continuity Planning

2006-2007: Tennessee Society of CPAs. Accounting and Auditing Update

2006-2007: Association of Certified Fraud Examiners, Middle TN Chapter. Fraud Investigation

2006-2007: Institute of Internal Auditors. Corporate Governance: Strategies for Internal Audit

2006-2007: Institute of Internal Auditors, Nashville Chapter. Emergency Planning and Risk Management Issues

2006-2007: Part-Time MBA Conference. 13th Annual Conference hosted by George Washington University

2005-2006 – 2006-2007: Institute of Internal Auditors, Nashville Chapter. Spring Internal Audit Director's Roundtable

2005-2006 – 2006-2007: Institute of Internal Auditors. Mid-Atlantic Region, District 3 Workshop

2005-2006: Institute of Internal Auditors, Nashville Chapter. Detecting Deception, Obtaining Cooperation and Confession

2005-2006: Institute of Internal Auditors, Nashville Chapter. Best Practices in Value Added Auditing

2005-2006: Institute of Internal Auditors, Nashville Chapter. Enterprise Risk Management

2005-2006: Institute of Internal Auditors, Nashville Chapter. Good to Great

2005-2006: Institute of Internal Auditors, Nashville Chapter. Internal Control and Security for the TN Lottery

2005-2006: Part-Time MBA Conference. 12th Annual Conference hosted by SMU

2005-2006: Tennessee Society of CPA's Leadership Conference.

2004-2005: Institute of Internal Auditors, Nashville Chapter. Chief Audit Director's Roundtable

2004-2005: Institute of Internal Auditors, Nashville Chapter. IIA Standards Update

2004-2005: Institute of Internal Auditors, Nashville Chapter. Sarbanes-Oxley: Implications for Internal Auditors

2004-2005: Institute of Internal Auditors. 2004 Fraud and Ethics Conference

2004-2005: Institute of Internal Auditors, Nashville Chapter. Chief Audit Director's Roundtable

2004-2005: Tennessee Society of CPA's Annual Meeting. Leadership meeting at the 74th Annual Convention

### **Professional Seminars / Workshops**

2018-2019: 2018 IIA/ISACA Governance Risk and Control Seminar. Where Governance and Risk Management Align for Impact (8/13 - 8/15/2018)

2017-2018: 2017 Delta Mu Delta Biennial Meeting. Enhancing Your Networking with Delta Mu Delta (11/3 to 11/5, 2017)

2016-2017: Tennessee Society of CPA's Annual Meeting. 86th Annual Meeting (6/13/2016)

2015-2016: 2016 Institute of Internal Auditors Central Regional Conference. Take the Stage (May 1-4, 2016)

2015-2016: Lipscomb University. The Serving Leader seminar (2/3/2016)

2015-2016: Ernst & Young Healthcare Update. Nashville Health Care Accounting and Financial Reporting Update (8/28/2015)

2015-2016: 2015 Governance, Risk, and Control Conference, IIA and ISACA. Where Governance and Risk Management Align for Impact (08/17-19/2015)

2014-2015: American Institute of CPAs. 2014 Joint Ethics Enforcement Program Annual Meeting (11/11/2014)

## **Honors & Awards**

### **Award**

2015-2016: John William Baker Summer Fellowship Award, Lipscomb University. Given in recognition of college teachers who have manifested excellence in the classroom.

2015-2016: 2015 International Teaching Excellence Award, Accreditation Council of Business Schools and Programs. The Baccalaureate Degree Commission created a similar award to recognize excellence in teaching at the baccalaureate/graduate degree level. ACBSP is the only specialized body for business schools that presents an award recognizing excellence in teaching, open to application by the entire membership.

2015-2016: 2015 Teaching Excellence Award, Region 3, ACBSP Region 3. The Baccalaureate Degree Commission created a similar award to recognize excellence in teaching at the baccalaureate/graduate degree level. ACBSP is the only specialized body for business schools that presents an award recognizing excellence in teaching, open to application by the entire membership.

2015-2016: 2015 Best of Regions Presentation Winner, 2015 ACBSP Region 3 Conference. "New" Knowledge from Professional Ethics Requirements named top presentation

### **Honor**

2018-2019: Star Chapter Award, Delta Mu Delta. Lipscomb's Eta Mu chapter was named a Star Chapter, presented each year to outstanding chapters of Delta Mu Delta. In 2019, only 22 of 300 chapters were recognized. This was Lipscomb's 11th year to earn the recognition.

2014-2015 – 2016-2017: Star Chapter Award, Delta Mu Delta. Lipscomb's Eta Mu chapter was named a Star Chapter, presented each year to outstanding chapters of Delta Mu Delta. In 2017, only 22 of 300 chapters were recognized. This was Lipscomb's 10th straight year to earn the recognition.

2015-2016: Moore-Walker Award for Volunteerism, Institute of Internal Auditors - Nashville Chapter. The Chapter's "Member of the Year" award was renamed to honor myself and Cynthia Walker. We were recognized on 5/4/2016, and all subsequent "Members of the Year" will be given this renamed award.

2014-2015: Faculty Adviser Service Award, Delta Mu Delta. 20 year service recognition as sponsor of their Eta Mu Chapter

2009-2010 – 2013-2014: Star Chapter Award, Delta Mu Delta. Lipscomb's Eta Mu chapter was named a Star Chapter, presented each year to outstanding chapters of Delta Mu Delta. In 2014, only 19 of 300 chapters were recognized. This was Lipscomb's 7th straight year to earn the recognition.

2010-2011: Faculty Adviser Service Award, Delta Mu Delta. 15 year service recognition as sponsor of their Eta Mu Chapter

2009-2010: Class Sponsor, Lipscomb University. Selected as the class sponsor for the December 2009 Graduation by the graduating class

2008-2009 – 2009-2010: Star Chapter Award, Delta Mu Delta. Lipscomb's Eta Mu chapter was named a Star Chapter, presented each year to outstanding chapters of Delta Mu Delta.

2004-2005: Outstanding MBA Teacher in a Concentration Class, Lipscomb University. Outstanding MBA Teacher in a Concentration Course - as voted by the graduating students at the spring commencement

2001-2002: Outstanding Service Award, Delta Mu Delta. Outstanding Service Award for help with their 2001 Triennial Meeting held in Nashville

2000-2001: Accounting Educator Award, Tennessee Society of CPA's. Accounting Educator Award, in recognition of significant contributions to accounting education (given to professors with less than 20 years of full-time teaching experience)

1994-1995: Member of the Year, Institute of Internal Auditors Nashville Chapter. Member of the Year

1991-1992: Outstanding Doctoral Teaching Assistant, J. M. Tull School of Accounting, University of Georgia. Outstanding Doctoral Teaching Assistant

1986-1987: Honor Society Induction, Beta Gamma Sigma. Inducted at the University of Alabama for my MA academic performance

### **Other Activities**

2020-2021 - Intellectual Pursuits Overview

2019-2020 - Teaching Philosophy

2018-2019 - Teaching Philosophy

2018-2019 - Administrative Philosophy

2018-2019 - Curriculum Vitae