

James A. Weisel, DBA, CPA, CMA
Professor of Accountancy
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Education:

- May, 1991 Doctor of Business Administration with a major in Accounting, University of Kentucky, Lexington, Kentucky.
Dissertation Title: "An Empirical Model for Classifying and Predicting the Financial Performance of Federally Insured Savings Associations"
- December, 1983 Masters Business Administration, Marquette University, Milwaukee, Wisconsin.
- May, 1982 Bachelor of Science with a major in Accounting, University of Wisconsin at La Crosse, La Crosse, Wisconsin.

Academic experience:

- August 2007 - Present Professor of Accountancy, School of Business, Georgia Gwinnett College.
Primary responsibilities include design of the accounting curriculum and teaching financial and managerial accounting courses at the undergraduate level.
- August 2004 – July 2007 Professor of Accountancy, Eugene W. Stetson School of Business & Economics, Mercer University.
Primary responsibilities are teaching Managerial Accounting for the MBA and EMBA programs. Additionally, I teach an elective in Fraud Examination for the MBA program and Managerial Accounting for the BBA program.
- August 2000 - 2004 Associate Professor of Accountancy, Eugene W. Stetson School of Business & Economics, Mercer University.
- August 1998- May 2000 Associate Professor, Division of Accounting & Business Law, School of Business, University of South Dakota.
Primary responsibilities are teaching managerial accounting at the graduate level and managerial accounting and principles of accounting at the undergraduate level. Additionally, I have been leading the pedagogy revision for principles of accounting and am a member of the SAP implementation team charged with integrating accounting information systems in the curriculum.
- August 1994-98 Assistant Professor, Division of Accounting & Business Law, School of Business, University of South Dakota.

Academic experience (Cont'd.):

- 1988 - 1994 Assistant Professor, School of Accountancy,
College of Business Administration, University of Akron.
Primary responsibilities included teaching cost accounting, principles of managerial accounting at the undergraduate level and managerial accounting at the graduate level.
- 1992 - 1993 Lecturer, Department of Accountancy,
Faculty of Business, Chinese University of Hong Kong, Hong Kong.
Primary responsibilities included teaching financial accounting at the graduate level and cost/managerial accounting at the undergraduate level.
- 1986 - 1988 Graduate Teaching Assistant, School of Accountancy,
College of Business and Economics, University of Kentucky.
Primary responsibilities included teaching managerial accounting at the undergraduate level.
- 1984 - 1986 Instructor, Department of Accounting,
College of Business Administration, Marquette University.
Primary responsibilities included teaching principles of accounting at the undergraduate level and coordinating the principles courses.

Other Academic experience:

- Summer 2006 Visiting Professor, Wing Lung Bank International Institute for Business Development at Hong Kong Baptist University.
Developed and delivered a course on financial modeling and analysis for the MBA Program.
- 2002 – 2006 Visiting Lecturer, Bad Mergentheim School of Business, Berufsakademie University of Cooperative Education, Germany.
Developed and taught a two-week course on Controllershship for the International Business Program.

Scholarly activities:

Publications in refereed journals:

“Dial a Forecast.” Journal of Accountancy. December 2006, pp. 75-78 (JoA is a professionally edited, blind reviewed, practitioner journal with an acceptance rate of less than 20%).

“Add Even More Muscle to ‘What-if’ Analyses.” Journal of Accountancy. March 2005, pp. 76-79. (JoA is a professionally edited, blind reviewed, practitioner journal with an acceptance rate of less than 20%).

“Add Muscle to ‘What-if’ Analyses.” Journal of Accountancy. September 2004, pp. 38-41. (JoA is a professionally edited, blind reviewed, practitioner journal with an acceptance rate of less than 20%).

Publications in refereed journals (cont'd):

“Help Your Clients Understand Capacity Utilization with Excel’s Solver Tool.” Journal of Accountancy. December 2003, pp. 62-67. (JoA is a professionally edited, blind reviewed, practitioner journal with an acceptance rate of less than 20%).

Co-authors Neal Harm and Cassie Bradley. “The Cash Factor.” Strategic Finance. September 2003, pp 29-33. (SF is a blind review, refereed academic / practitioner journal with an acceptance rate less than 20%).

“Sabbatical Marine, Inc.: Utilizing Constrained Resources.” The Journal of Accounting Case Research, Spring 2003, Vol. 7, No. 2, Fall 2003, pp. 75-90. (JACR is a blind review, refereed academic journal with an acceptance rate of approximately 21 – 30%).

“The Financial Reporting Revolution and XBRL: Another Fad is This Really Going to Work?” The Journal of Accounting and Finance Research, Summer 2002, Vol. 10. No. 3, pp. 26-34. (JAFR is a reviewed, refereed academic journal with an acceptance rate of 21 – 30%).

“The Next Generation of Information Systems: Transforming Data into Business Intelligence For the 21st Century.” The Journal of Accounting and Finance Research, Summer 2001, Vol. 9, No. 2, pp. 74 – 82. (JAFR is a reviewed, refereed academic journal with an acceptance rate of 21 – 30%).

“Redesigning Principles of Accounting: Adapting Best Practices Methodology.” The National Accounting Journal, Winter 2000, Vol. 2, No. 1, pp. 43-53. (NAJ is a blind review, refereed academic journal with an acceptance rate of approximately 21 – 30%).

Co-author Murray Lynn, “Cathay Pacific Airways Limited,” Journal of Accounting Case Research, Vol. 4, No. 2, 1998, pp. 39-45. (JACR is a blind review, refereed academic journal with an acceptance rate of approximately 21 – 30%).

“Hong Kong Airport Core Programme,” Journal of Accounting Education, Vol. 15, No. 3, 1997, pp. 371-388. (JAE is a blind review, refereed academic journal with an acceptance rate of approximately 11-20%)

Co-authors Randall D. Garrison and Arthur Hart, “Cut and Deal New Savings with Procurement Cards,” Management Accounting, April 1997, pp. 16-22. (MA is a blind review, refereed academic/ practitioner journal with an acceptance rate of approximately 6 - 10%)

Scholarship in Process:

“Forecasting Made Easy.” Journal of Accountancy. Under review (JoA is a professionally edited, blind reviewed, practitioner journal with an acceptance rate of less than 20%).

Publications in Refereed Conference Proceedings:

Co-authors William E. Wilcox and Jon Carpenter, “The Role of the First Accounting Course: Status and Impact of Curricular Revision.” in the Proceedings of the American Academy of Accounting and Finance Annual Meeting, December 8-11, 1999.

Co-authors Randy D. Jorgensen and William E. Wilcox, “Principles of Accounting vs. Corporate Finance: Who's doing what with Discounted Cash Flow?” in the Proceedings of the American Academy of Accounting and Finance Annual Meeting, New Orleans, LA, December 3-5, 1998.

Publications in Refereed Conference Proceedings (cont'd):

"Redesigning Principles of Accounting: A Guided Learning Competency Based Approach." in the Proceedings of the American Academy of Accounting and Finance Annual Meeting, New Orleans, LA, December 3-5, 1998.

"South Dakota Microbrewery," in the Proceedings of the 1997 American Accounting Association Management Accounting Research Conference, October 30 - November 1, 1997.

"Hong Kong Airport Core Programme," in the Proceedings of the American Accounting Association Management Accounting Conference, San Antonio, Texas, November 1-2, 1996.

"U.S. and Asian Stock Market Integration: A Ten Year Canonical Correlation Analysis," in Global Business Trends: Contemporary Readings, Proceedings of the Global 1994 Business Trends Conference, Academy of Business Administration, Maryland, Sammy G. Amin and Nejdet Delener editors, November 1994.

"Learning Theories and Applications of Microcomputers in the Managerial Accounting Curriculum," in Business Trends for the 21st Century, Proceedings of the 1994 National Conference, Academy of Business Administration, Maryland, USA, David L. Moore and Sammy G. Amin editors, February 22-27, 1994.

"Applications of Microcomputers in the Managerial Accounting Curriculum: A Framework and Empirical Investigation," in the Proceedings of the Academy of International Business Western & Southwestern Asian Regional Meeting, Hong Kong, June 23-25, 1993.

Presentations at Refereed Conferences:

"Financial Modeling for Profit Maximization." Presented at the 2005 Spring Decision Makers Conference, April 27-28, 2005.

"Using Excel to Teach Theory of Constraints." Presented at the 2003 Academy of Accounting and Finance Annual Meeting, December 11 -13, 2003.

"The Financial Reporting Revolution and XBRL: Another Fad is This Really Going to Work?" Presented at the 2001 Academy of Accounting and Finance Annual Meeting, December 9 -11, 2001.

"The Next Generation of Information Systems: Transforming Data into Business Intelligence For the 21st Century." Presented at the 2000 American Academy of Accounting and Finance Annual Meeting, December 7-10, 2000.

Co-authors William E. Wilcox and Jon Carpenter, "The Role of the First Accounting Course: Status and Impact of Curricular Revision." presented at the 1999 American Academy of Accounting and Finance Annual Meeting, December 8-11, 1999.

Co-presenters Randy D. Jorgensen and William E. Wilcox, "Principles of Accounting vs. Corporate Finance: Who's doing what with Discounted Cash Flow?" presented at the 1998 American Academy of Accounting and Finance Annual Meeting, December 3-5, 1998.

"Redesigning Principles of Accounting: A Guided Learning Competency Based Approach." presented at the 1998 American Academy of Accounting and Finance Annual Meeting, December 3-5, 1998.

Co-presenter Randall D. Garrison, "Evaluating the Uses and Applications of Purchasing Cards for Streamlining Your Payment Process." presented at The Institute for International Research Electronic Payment Systems & Smart Card Technology Conference, November 23-25, 1998.

Presentations at Refereed Conferences (cont'd):

"South Dakota Microbrewery," presented at the American Accounting Association 1997 Management Accounting Research Conference, October 30 - November 1, 1997.

Co-presenter Susan D. Haugen, "Effective Use of Multimedia and the Internet: Instructional Design Issues," presented at the Midwest Accounting Society Annual Meeting, Chicago, IL, March 11-14, 1997.

"Hong Kong Airport Core Programme," presented at the American Accounting Association Management Accounting Conference, San Antonio, TX, November 1-2, 1996.

Co-presenter Susan D. Haugen, "Multimedia and the Internet As Tools to Enhance Classroom Learning," presented at the 1996 International Association of Computer Information Systems Annual Conference in Las Vegas, NV, September 26-28, 1996.

Co-presenters Leon Korte and Robert E. Rosacker, "Examination Question Types: An Analysis of Effects in the Principles of Accounting Course." presented at the 1996 Midwest American Accounting Association Conference in Kansas City, MO, April 18-20, 1996.

"Using a Group Learning Strategy in Cost Accounting." presented at the 1996 Midwest Business Administration Association Annual Conference in Chicago, IL, March 13-15, 1996.

"U.S. and Asian Stock Market Integration: A Ten Year Canonical Correlation Analysis," in *Global Business Trends: Contemporary Readings*, presented at the Academy of Business Administration Global Business Trends Conference, Cancun, Mexico, November 10-13, 1994.

Co-presenter Murray Lynn, "Swire Pacific Limited Case", presented at the 1994 American Accounting Association Ohio Region Conference, May 4-6, 1994.

"Learning Theories and Applications of Microcomputers in the Managerial Accounting Curriculum," presented at the Academy of Business Administration 1994 National Conference, Las Vegas, NV, February 22-27, 1994.

"Applications of Microcomputers in the Managerial Accounting Curriculum: A Framework and Empirical Investigation," presented at the Academy of International Business Western & Southwestern Asian Regional Meeting, Hong Kong, June 23-25, 1993.

Other Publications:

Co-author Margorie Platt, "Turning Around the South Dakota Microbrewery" in *A Casebook on Corporate Renewal Casebook*, Platt & Platt eds. 2004, University of Michigan Press, pp. 312-318.

Co-authors Bobbe Barnes and Kevin Stevens, *Study Guide to Accompany Managerial Accounting by Ricketts and Gray*, 1988, Houghton-Mifflin, Boston.

Leadership Experience:

Chair, IEE2 & GE2 Creativity and Critical Thinking Goal Team, 2007 – Present.

I have responsibility for leading the goal team in the development of an operational definition of our goal, identifying learning models to accomplish the goal, and determine how best to assess the goal.

Chairman, SSBE Promotion & Tenure Committee, 2004-2007.

I have responsibility for coordinating the activities of the School of Business & Economics Promotion and Tenure Committee. Our activities include review of promotion and tenure applications as well as pre-tenure reviews.

Member, University Assessment Council, 2003-2007.

The University Assessment Council acts as a liaison for the 180+ assessable units (academic as well as service) of the university. Members of the Council provide guidance to these units in their development and maintenance of assessment programs for SACS accreditation.

Chairman, Art Volk Symposium Committee, 1999-2000.

In recognition of Art Volk's service to the University, an endowment of approximately \$200,000 was established. The income from this endowment has been used to bring prominent accounting scholars, practitioners, and business leaders to campus to discuss national accounting and business topics. The topics are selected to be of interest to faculty, students, and business leaders. The participants and issues selected are of such magnitude as to attract national attention and add status to the School of Business, and reflect well on the legacy of Art Volk.

President, Institute of Management Accountants, Siouxland Chapter, 1997 - 1998.

As President of the chapter I was its chief administrative and executive officer. My primary responsibility included ensuring that the board meets regularly, functions effectively, and that the officers and directors understand and perform their duties adequately. To ensure the successful operation of the chapter, the President creates an atmosphere in which the officers and directors are encouraged to plan and carry out activities, work together on projects, and lay the foundation for improved chapter operations and functions in future years. Finally, the President was responsible for defining strategic goals and operational objectives for the planning year.

Chairman, Accounting Department Enrollment Management Committee, 1997

The Enrollment Management Committee was to; (1) document the changes in enrollments in the accounting program at USD as it compares with regional institutions, (2) identify the major issues faced by the faculty regarding competition and enrollment, and (3) identify opportunities that can be employed to capitalize on the strengths of the program and our faculty.

Coordinator, MainStreet Accounting Center of Excellence proposal project, 1996

I acted as the lead person for the MainStreet Accounting Center of Excellence proposal project. This involved gaining consensus among the faculty for the strategic goals of the Center and coordinating the activities related to developing the proposal. Although the proposal was eventually not funded by the South Dakota Board of Regents, the proposal was widely recognized as a professional, well-developed work.

"This proposal seeks funding to establish the MainStreet Accounting Center in the School of Business at the University of South Dakota as a Center of Excellence under the Board of Regent's Reinvestment Through Efficiencies program. The MainStreet Accounting Center will emphasize three principal activities directed at creating, supporting, and enhancing economic development in South Dakota. These activities are applied research, nontraditional education opportunities, and continued evolution of academic programs."

Treasurer for the Friends of the W.H. Over State Museum, January 1995 - December 1996.

My duties with the Friends of the Museum consisted of maintaining accounting records and ensuring proper fiscal management for an annual budget of approximately \$100,000. Additionally, the responsibilities of treasurer expanded significantly during 1996 as the Museum began to move from a wholly state supported organization to a privatized, non-profit organization.

Professional service activities:

- 2007 – Present, Vice-President of Communications, Institute of Management Accountants, Atlanta Chapter.
- 2006 – 2007, Newsletter Editor, Institute of Management Accountants, Atlanta Chapter.
- 2005, Speaker at the Georgia Society of CPAs 2005 Decision Makers Conference. “Financial Modeling for Profit Maximization,” April 28, 2005, Atlanta, GA.
- 2005, Speaker at the Institute of Management Accountants CPE Session. “Modeling Complex Capital Expenditure Decisions with Excel.” March 15, 2005, Atlanta, GA.
- 2004 – 2006, Vice-President Membership and Student Activities, Institute of Management Accountants, Atlanta Chapter.
- Speaker at the Design Interest Group CPE Session, “Fraud in the Workplace” June 25, 2003, Atlanta, GA
- Speaker at the Institute of Management Accountants CPE Session, “The Cash Factor: A New Look at an Old Tool” March 27, 2003, Atlanta, GA
- Institute of Management Accountants, Gulf South Council. Developed and delivered an 8-hour professional development seminar “Theory of Constraints: Maximizing Profitability And Capacity Utilization,” Orange Beach, AL, May 16, 2003.
- 2003, Manuscript reviewer, American Accounting Associational Annual Conference, Honolulu Hawaii.
- 2002 – present, Reviewer, Journal of Accounting and Finance Research.
- Speaker at the Institute of Management Accountants CPE Session, “Theory of Constraints: Improving Decision Making” October 25, 2001, Atlanta, GA
- Speaker at the Institute of Management Accountants CPE Session, "Fundamentals of the Balanced Scorecard", May 24, 2001, Atlanta, GA.
- 2000, Manuscript reviewer, Journal of Business and Behavioral Sciences.
- 1999-2000, Regional Director, North Central Council, Institute of Management Accountants.
- 1999-present, Member, Editorial Review Board, National Accounting Journal.
- Presented the workshop “SAP, ERP, and Scope Creep” at the November 16, 1999 meeting of the Siouxland Chapter of the Institute of Management Accountants.
- 1998-1999 Newsletter Director and Immediate Past President, Institute of Management Accountants, Siouxland Chapter.
- Session Chair - "Cost/Managerial Accounting II," Midwest Accounting Society Annual Meeting, Chicago, IL, March 25-27, 1998.
- 1997 - 1998 President, Institute of Management Accountants, Siouxland Chapter.
- 1996 - 1997 Vice President of Membership Development, Institute of Management Accountants, Siouxland Chapter.
- 1996 - 2000 National Director-at-Large of the North American Accounting Society (formerly Midwest Accounting Society).
- Manuscript reviewer for the 1997 American Accounting Association Annual Meeting, Dallas, TX, August 18-20, 1997.
- Manuscript reviewer for the 1997 Midwest Accounting Society Annual Meeting, Chicago, IL, March 11-14, 1997.

Professional Service Activities (cont'd):

Presented “Effectively Searching the Internet,” at the meeting of the Siouland Chapter of the Institute of Management Accountants, December 4, 1996.
Participant, “Faculty Development International Business,” hosted by the Robert Wang Center for International Business, The University of Memphis, June 9 - 12, 1995.
Manuscript reviewer for the Academy of Business Administration Global Business Trends Conference, Cancun, Mexico, November 10-13, 1994.
Discussant, Finance Topics, Academy of Business Administration Global Business Trends Conference, Cancun, Mexico, November 10-13, 1994.
Discussant, Accounting Topics, Decision Sciences Institute 1994 Annual Midwest Meeting, Cleveland, OH, April 24 - 26, 1994.
Discussant, Accounting Session, Academy of Business Administration 1994 National Conference, Las Vegas, NV, February 22-27, 1994.
Chairperson, Topics in Accounting, Academy of International Business Western & Southwestern Asian Regional Meeting, Hong Kong, June 24, 1993.

Service activities at Georgia Gwinnett College:

2007 – Present, Chair, IEE2 & GE2 Goal Team: Creativity and Critical Thinking
2007 – Present, Member, Educational Technology College Wide Committee
2007 – Present, Member, Internationalization College Wide Committee
2007 – Present, Advisor to Technology Services on Faculty Collaboration SharePoint Implementation

Service activities at the Mercer University:

2006 – 2007, Member, SSBE Tenure & Promotion Committee
2004 – 2006, Chair, SSBE Tenure & Promotion Committee
2003 – Present, Member, University Assessment Council
2003 – 2004, Member, SSBE Intellectual Contributions Committee
August 2003, 2004 participated in the EMBA Boot camp
April 2003, participated in the HCM Oral Examinations
2002 – 2003, Member, Mercer University Research Policies and Procedures Task Force
2002 – 2003, Chairperson, SSBE Intellectual Contributions Committee
March 26, 2002. Developed and delivered “Financial Accounting: Wading Through the Numbers” for the PRSA workshop series.
2001 – Present, SSBE Accounting Discipline Coordinator
2001 – 2002, member of SSBE Intellectual Contributions Committee
2000, member of SSBE Accounting Faculty Search Committee
2000 – 2001, member of SSBE AACSB Internal Audit Task Group

Service activities at the University of South Dakota:

- Participated in the development and delivery of "*Budgeting and Fiscal Analysis*" course for Sioux Falls Department Managers, Spring 2000.
- Member, University Special Committee on Institutional Graduation Requirements, 1999.
- Member, University North Central Association of Colleges and Schools Accreditation Committee, 1999-
Chairman, Art Volk Symposium Committee, 1999-2000
- Member, School of Business Ad hoc Committee on E-Business, 1999-2001.
- Developed and conducted a two-day faculty workshop, "*Developing and Launching a Successful WebCT Course.*" WebCT is an Internet enabled course management software package being adopted by the University of South Dakota for the delivery of technology based and distance education courses. January 30 and February 6, 1999.
- Member, Division of Accounting & Business Law Accreditation Committee, primary responsibility for Curriculum Content and Evaluation Section of the Self-Evaluation Report.
- Developed and conducted two courses, "*Cost Containment*" and "*Resource Utilization*", for the Rapid City Regional Hospital Advanced Management Training Program. The training program is designed to develop department manager's understanding of core business structures, systems, practices, trends, and technologies.
- Member, School of Business SAP Implementation Team, 1997-
Business School representative on the Learning Resources Committee of University Senate for the 1997 - 1998 academic year.
- Member, Advisory Board for the Center for Instructional Design and Delivery (CIDD), 1997 -
Member, School of Business MBA Curriculum Committee, September 1997 -
Guest Lecturer, HSAD 410/510 (Health Services Finance), September 29, 1997
Chairperson, School of Business MBA Computer Support Group, January 1997 -
Presented a workshop to the School of Business Faculty, "*Web Publishing Techniques - The Easy Way,*" November 18, 1997.
- Participated as an international business panel member discussing "Are We Becoming too Dependent on Asia," November 1, 1997.
- Delivered "*The Essentials of Planning, Implementing, and Maintaining an Effective Web Site,*" a two-hour RDT Network session delivered April 10, 1997 with forty-nine participants at seven sites throughout the state.
- Delegate, University of South Dakota Conference of Senates, September 1996 -
Service on the School of Business Curriculum Subcommittee for International Programs, January 1996 -
Accounting Department Liaison for the School of Business Student Enrichment Center, September 1996
Service on the School of Business Siouxland International Project Grant Award Committee, Spring, 1996.
Service on the Art Volk Symposium Committee, Spring 1996.
- Co-presenter, "*Making A Difference with Welfare Reform,*" Department of Social Services Economic Assistance Conference, Pierre, South Dakota, August 12-14, 1996.
- The Department of Social Services of South Dakota has contracted with the Business Research Bureau of the School of Business to conduct a multiyear evaluation of the Strengthening South Dakota Families Initiative. The initiative is designed to radically reform the implementation of South Dakota's welfare system. I am a member of the team undertaking this evaluation.
- Half-time appointment to the Center for Instructional Design and Delivery (CIDD),
September 1996 - May 1997.
- Developed and delivered an eight part "*Web Site Development Workshop Series,*" Twenty-two School of Business faculty and staff participated in this workshop series, Spring 1997.
- Service on School of Business MBA Admissions Committee, August 1995 – 2000.
- Responsible for academic advising of approximately 30 junior and senior accounting majors each semester.

Successful Grant activity:

1998 Governor Janklow Teaching and Technology Award recipient. “Redesigning Principles of Accounting: A Guided Learning, Competency Based Model.” This grant application, valued at approximately \$29,000 seeks to significantly increase the use of technology by the students in the principles of accounting courses, significantly increase the use of technology for delivery of content and management of these courses, drastically alter the content of the courses to improve the knowledge, skills, and abilities of all School of Business students, and improve the coordination of instruction and learning throughout all sections of the principles of accounting course sequence.

April 1997, University Office of Research Proposal Incentive Grant. The grant of \$3,500 was utilized to identify governmental and corporate sources of funding for the MainStreet Accounting Project.

1996 - 1997 Clifford Graese/KPMG Peat Marwick Faculty Fellow. The grant of \$8,766 was utilized for the project entitled “Developing Multimedia Modules for Managerial Accounting.”

Professional experience:

- 2001 - Present President, SCM Consulting, Ltd.
Primary focus is on design and implementation of strategic cost management systems for small and medium size enterprises and continuing professional education in the area of budgeting and financial analysis for Controllers, CFOs, and Business Analysts.
- 1994 - 2000 Consultant, Business Research Bureau.
The Department of Social Services of South Dakota contracted with the BRB to conduct a multiyear evaluation of the Strengthening South Dakota Families Initiative. The initiative is designed to radically reform the implementation of South Dakota’s welfare system. I was a member of the team undertaking this evaluation.
- 1993 Associate, Asian Management Consultants, Ltd.
Primary responsibilities consisted of assisting in the design of Accounting and Finance seminars for the Modern Business Management training program for Chinese managers.
- 1993 Consultant, ASTEC International, Ltd. Hong Kong
Primary responsibilities consisted of the assessment of the China II Divisional Controller’s Office and the development of the division’s management/cost accounting system and its integration with the corporate management information system.
- 1982 - 1984 Consultant, Small Business Administration, Milwaukee, Wisconsin
Primary responsibilities consisted of the design and implementation of accounting systems for small businesses in the Milwaukee area.
- 1980 Staff Auditor Intern, Blue Cross Blue Shield of Wisconsin, Milwaukee, Wisconsin
Primary responsibilities consisted of assisting senior staff with the Medicare audits of health care providers in Wisconsin.

Consultancy Activities:

2007, Consultant, Sibley Heart Cardiology. Provided assistance in refining revenue and cash flow budgeting systems.

2005 – Present, Seminar Leader, National Center for Continuing Education. Lead regular workshops on budgeting and financial modeling using Excel.

2001, Gary's Foods, Atlanta, GA. Assessed strengths and weaknesses of the current cost accounting system and redesigned the product costing and pricing system.

Professional certification:

CMA certificate #21695, 1999

CPA certificate #53743, 1991

Professional memberships:

Association of Certified Fraud Examiners, 2003 - Present

American Institute of Certified Public Accountants, 2000 - Present

Beta Gamma Sigma, 2000 - Present

International Association for Accounting Education and Research, 1996 - Present

Beta Alpha Psi, Professional Accounting Fraternity, 1996 - Present

American Accounting Association, 1991 - Present

Delta Sigma Pi, Professional Business Fraternity, 1991 - Present

Institute of Management Accountants, 1989 - Present