

## BRIGITTE W. MUEHLMANN

Office: Babson College      LinkedIn: <http://www.linkedin.com/in/bmuehlmann>  
 231 Forest Street      Citizenship: U.S. and Austria  
 Wellesley, MA 02481  
 (781) 239-5953  
[bmuehlmann@babson.edu](mailto:bmuehlmann@babson.edu)

EXPERIENCE

*Babson College, Wellesley, MA*  
 2016-present Professor  
 2016-2018 Chair, Accounting & Law Division  
 2014-2016 Associate Professor

2020-present *Texas A&M University School of Law, Graduate Program in Risk Management*  
 Adjunct Professor, part-time

2007-2014 *Suffolk University, Sawyer Business School, Accounting Department*  
 Associate Professor

2005-2011 *WU - Vienna University of Economics and Business, Austria, Graduate School and Executive Academy, part-time*

2000-2007 *Bentley University, Department of Law, Financial Planning and Taxation*  
 Associate Professor

1999-2000 *Kearney, New York, Strategy Group, Transfer Pricing, Intellectual Property*  
 Senior Manager

1996-1999 *PricewaterhouseCoopers, Boston, Global Tax Services, Transfer Pricing*  
 Senior Manager & Manager

1992-1996 *Ernst & Young, Boston, Entrepreneurial Services, Audit, Forensic Accounting*  
 Manager & Associate

1989-1992 *Ernst & Young, Austria, Vienna, Tax, Assurance and Advisory*  
 Manager & Associate

EDUCATION

*WU - Vienna University of Economics and Business (AACSB and EQUIS-accredited)*  
 1995 Doctorate in Social and Economic Sciences - Dr. rer. soc. oec.  
 Evaluated to be equivalent to Ph.D., summa cum laude (mit Auszeichnung)

1988 Master in Economic and Social Sciences - Mag. rer. soc. oec.  
 Evaluated to be equivalent to M.S.B.A.  
 Includes undergraduate education, no separate degree awarded  
 Concentrations: Accounting, Entrepreneurship, Tax Law

*Bentley University, Waltham, MA (AACSB and EQUIS-accredited)*  
 2000 Master of Science in Taxation, with distinction

WORKING LANGUAGES

English, German

## PROFESSIONAL CERTIFICATIONS

- 2019 Transformational Neuro-Coaching
- 2017 Entrepreneurship Education
- 2012 Chartered Global Management Accountant (CGMA)
- 2000 Certified in Financial Management (CFM)
- 2000 Certified Management Accountant (CMA)
- 2000 Certified Valuation Analyst (CVA)
- 1995 Certified Public Accountant (CPA), certified in Massachusetts
- 1992 Certified Tax Adviser, Austria, inactive

## AWARDS

- 2026 & Kennedy Award for Teaching Excellence, FW Olin Graduate School of Business
- 2025 FW Olin Graduate School of Business, Babson College
- 2024 & Kennedy Award Finalist
- 2020 FW Olin Graduate School of Business, Babson College
- 2022 & Distinguished Service Award
- 2014 Strategic and Emerging Technologies Section, American Accounting Association (AAA)
- 2020 American Accounting Association/J. Michael and Mary Anne Cook/Deloitte Foundation Prize  
The foremost recognition of an individual who consistently demonstrates the attributes of a superior teacher in the discipline of accounting.
- 2019 Babson Research Scholar, 3 years
- 2018 Mark Chain/Federation of Schools of Accountancy Teaching Innovation Award, AICPA,  
For “Sustainability at *Interface, Inc.*: Applying the qualitative characteristics of useful financial information to environmental, social and governance (ESG) factor data” with Virginia Soybel and Robert Turner
- 2018 Outstanding Educator Award  
Strategic and Emerging Technologies Section, AAA  
For outstanding achievements in education in the field of strategic and emerging technologies in accounting
- 2018 Best Paper Award  
Twenty-seventh Annual Research Workshop on Strategic and Emerging Technologies, AAA  
For “Bringing emerging technology research in accounting classrooms: A bibliometric approach”, with Qi Liu, Victoria Chiu and Amelia Baldwin
- 2017 Best Paper Award  
Twenty-sixth Annual Research Workshop on Strategic and Emerging Technologies, AAA  
For “A Bibliometric Analysis of Accounting Information Systems Journals and Their Emerging Technologies Contributions”, with Victoria Chiu, Qi Liu and Amelia Baldwin
- 2015 Competitive Manuscript Award  
Forensic Accounting Section, AAA  
For “The Use of Forensic Accounting Experts in Tax Cases as Identified in Court Opinions”, with Priscilla Burnaby
- 2011 Best Teacher Award for Excellence, Executive Academy  
For Professional MBA Controlling & Finance, Vienna University of Economics and Business
- 2009 Mark Chain/Federation of Schools of Accountancy Graduate Teaching Innovation Award  
For “Cultivating the Five Minds for the Future in a Tax Course”
- 2009 Beta Alpha Psi Teacher of the Year Award, Suffolk University Chapter
- 2008 American Taxation Association/Deloitte Teaching Innovation Award  
For “The Travels of a T-Shirt in the Global World of Taxation”
- 2006 Best Paper Award  
Fifteenth Annual Research Workshop on Strategic and Emerging Technologies, AAA  
For “A Cognitive Model for Tax Problem Solving”, with Roland Hubscher
- 2003 Gregory Adamian Award for Teaching Excellence, Bentley University

COURSES TAUGHT (\* denotes course design in addition to teaching)

|                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Executive MBA:        | Financial Reporting Environment *<br>IFRS v. U.S. GAAP Financial Reporting *                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Graduate:             | Financial and Sustainability Reporting *<br>Designing a Business for Profitability *<br>Resource Planning and Control *<br>International Tax Risk Management (Data, Analytics & Technology) *<br>Doing Business Globally: Highways and Landmines (with John Marthinsen) *<br>Financial Accounting and Reporting<br>Financial Statement Analysis *<br>Affiliated Corporations *<br>Multi-Jurisdictional Taxation *<br>Strategic Business Tax Planning (CEMS Program in Europe, at WU) *<br>Tax Policy (capstone) *<br>Issues in Federal Taxation<br>Investments and Capital Accumulation * |
| Undergraduate:        | Financial Reporting and Analysis<br>Federal Taxation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Pre-College:          | Accounting & Finance (with Jia Hao) *                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| MBA Workshop:         | Financial Statement Basics *                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| MBA Start-Up Module:  | Financial Reporting, Miami Edition *                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Executive Workshop:   | Financial Reporting for Entrepreneurial Leaders *                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Faculty Workshop:     | Design Science Research in Accounting *                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Continuing Education: | Entrepreneurial Leadership & ESG (with Cheryl Kiser, Chris Lloyd, and Patrick Gregory) *<br>International Taxation                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

HONORS

|             |                                                        |
|-------------|--------------------------------------------------------|
| 2012 – 2014 | “Thank-a-Prof”, Suffolk Center for Teaching Excellence |
| 2010        | Nominee for Outstanding Staff Member of the Year       |
| 2008 + 2010 | Nominee for SBS Outstanding Faculty of the Year        |
| 2008        | Nominee for Unsung Hero – SBS Faculty/Staff            |

## PROFESSIONAL EXPERIENCE

- 2023-2025** *CreditRiskMonitor.com (CRMZ)*, New York  
Board of Directors, Member and Chair of Audit Committee
- 1999-2000** *Kearney*, New York  
Strategy Group, Manager  
  
Business and Economic Strategy Consulting - international transfer pricing, intellectual property. Client base included *General Motors*, *Siemens*.
- 1996-1999** *PricewaterhouseCoopers*, Boston  
Global Tax Services, Senior Manager and Manager  
  
Vision team, international and multi-state transfer pricing, intellectual property valuation, U.S. leader for transfer pricing in the investment management industry, international tax liaison between U.S. and German-speaking countries Austria, Germany and Switzerland.  
  
Client base examples:  
Investment Management – *Fidelity*, *PanAgora*  
Services – *Boston Consulting Group*  
Retail – *TJX*, *BJ's Wholesale Club*, *FoodLion*, *Hannaford*  
HighTech – *Scitex*, *PictureTel*, *Natural MicroSystems*  
Manufacturing – *Tyco International*, *Barnes*, *Atomic Ski*  
Entertainment – *National Amusements*
- 1992-1996** *Ernst & Young*, Boston  
Entrepreneurial Services, Audit, and Forensic Accounting, Manager and Associate  
  
Audits and reviews of private and public U.S. companies, subsidiaries of, and joint ventures with, European multi-national enterprises; fraud investigation; tax consulting on Austria-related issues.  
  
Client base included: Manufacturing and distributing companies in the High-Tech and various other industries, health care and other not-for-profit organizations.
- 1989-1992** *Ernst & Young*, Vienna, Austria  
Comprehensive Practice in Tax, Assurance and Advisory, Manager and Associate  
  
Consulting on domestic and international tax issues, asset and business valuations, turnaround consulting, included nine months as interim CEO during reorganization proceedings of a company with \$100+ million annual revenue and 500+ employees; audits of subsidiaries of foreign-based multi-national companies, audits of Austrian public companies.  
  
Client base included: Manufacturing, wholesale and retail companies in the pharmaceutical, chemical, consumer products, mining and various other industries, high-profile families.

## PUBLICATIONS

### BOOK

- I    “Entwicklung der Konzernbesteuerung in den USA: Eine Analyse von 80 Jahren der Konzernbesteuerung im Umfeld von Geschichte, Politik, Wirtschaft und Rechnungslegung”, (The Development of the Taxation of Affiliated Corporations in the United States: An Analysis of 80 Years of Group Taxation in its Environment of History, Politics, Economics and Accounting, based on dissertation supervised by H. Peter Holzer)  
Linde Verlag, Vienna, 1996.

### NATIONAL REPORT

- I    “Group approach and separate entity approach in domestic and international tax law”, International Fiscal Association, Cahiers de Droit Fiscal International, Volume 106A, Editors: Johanna Hey and Arne Schnittger, IBFD, pp. 815-836, 2022.

### PEER-REFEREED JOURNALS

- 20   “Technology agility supported by a growth mindset: A new requirement for accounting curricula”, Qi Liu, Amelia Baldwin, Victoria Chiu and Brigitte Muehlmann, Journal of Emerging Technologies in Accounting, Volume 20, Issue 2, pp. 11-28, 2023.
- 19   “The ChatGPT Artificial Intelligence Chatbot: How Well Does It Answer Accounting Assessment Questions?”, David Wood et al., Issues in Accounting Education, Volume 38, Issue 4, pp. 1-28, 2023. Crowd-sourced paper published with 300+ coauthors.
- 18   “Bringing scholarly data analytics knowledge using emerging technology tools in accounting into classrooms: A bibliometric approach”, Qi Liu, Victoria Chiu, Brigitte Muehlmann and Amelia Baldwin, Issues in Accounting Education, Volume 36, Issue 4, pp. 153-181, 2021.
- 17   “Measuring the drafting alignment of patent documents using text mining”, Davit Khachatryan and Brigitte Muehlmann, PLOS ONE, 15(7), e0234618, 2020.
- 16   “Measuring Technological Breadth and Depth of Patent Documents using Rao’s Quadratic Entropy”, Davit Khachatryan and Brigitte Muehlmann, Journal of Applied Statistics, Volume 46, Issue 15, pp. 2819-2844, 2019.
- 15   “A Bibliometric Analysis of Accounting Information Systems Journals and Their Emerging Technologies Contributions”, Victoria Chiu, Qi Liu, Brigitte Muehlmann and Amelia Baldwin, International Journal of Accounting Information Systems, Volume 32, pp. 24-43, 2019.
- 14   “Case: The Accountant and the Error of His Ways”, Brigitte Muehlmann, Virginia Soybel and Robert Turner, Journal of Forensic and Investigative Accounting, Volume 10, Issue 2, pp. 287-293, 2018.
- 13   “Determinants of Successful Patent Applications to Combat Financial Fraud”, Davit Khachatryan and Brigitte Muehlmann, Scientometrics, Volume 111, Issue 3, pp. 1353-1383, June 2017.

- 12 ["Emerging Technologies Research in Accounting: JETA's First Decade"](#) (A Bibliometric Analysis), Brigitte Muehlmann, Victoria Chiu and Qi Liu, *Journal of Emerging Technologies in Accounting*, Volume 12, pp. 17-50, 2015.
- 11 ["The Role of Special Masters in Federal Tax Cases,"](#) Brigitte Muehlmann and Priscilla Burnaby, *Journal of Forensic and Investigative Accounting*, Volume 7, Issue 2, pp. 1-30, July-December 2015.
- 10 ["Case: Fighting International Fraud with the FCPA,"](#) Priscilla Burnaby, Susan Hass and Brigitte Muehlmann, *Journal of Forensic and Investigative Accounting*, Volume 7, Issue 1, pp. 276-300, January-June 2015.
- 9 ["Summary Witness Testimony in Tax Litigation Cases,"](#) Brigitte Muehlmann, Priscilla Burnaby and Martha Howe, *Journal of Forensic and Investigative Accounting*, Volume 5, Issue 1, pp. 1-34, January-June 2013.
- 8 ["The IRS and the SEC Whistleblower Awards Programs,"](#) Martha Howe, Priscilla Burnaby and Brigitte Muehlmann, *Fraud Magazine*, Volume 28, Number 3, pp. 48-52, May/June 2013.
- 7 ["Income from Student Inventions and the Kiddie Tax,"](#) Brigitte Muehlmann, Wanny Baez and Priscilla Burnaby, *ATA Journal of Legal Tax Research*, Volume 10, Issue 2, pp. 1-13, July-December 2012.
- 6 ["The Use of Forensic Accounting Experts in Tax Cases as Identified in Court Opinions,"](#) Brigitte Muehlmann, Priscilla Burnaby and Martha Howe, *Journal of Forensic and Investigative Accounting*, Volume 4, Issue 2, pp. 1-34, July-December 2012.  
 - Competitive Manuscript Award, American Accounting Association, Forensic Accounting Section, 2015.  
 - Highlighted in *Value Examiner*, Academic Research Brief No. 2, which summarizes significant contemporary research in valuation and forensic accounting, March/April 2013.
- 5 ["Reducing Vendor Fraud Risk: Using the Excluded Parties List System,"](#) Martha Howe, Priscilla Burnaby and Brigitte Muehlmann, *Fraud Magazine*, Volume 25, Number 2, pp. 21-22, 51, March/April 2011.
- 4 ["Detecting Fraud in the Organization: An Internal Audit Perspective,"](#) Priscilla Burnaby, Martha Howe and Brigitte Muehlmann, *Journal of Forensic and Investigative Accounting*, Volume 3, Issue 1, pp. 194-232, January-June 2011.
- 3 ["The Travels of a T-shirt in the World of Taxation: Teaching Multi-Jurisdictional Taxation,"](#) Brigitte Muehlmann and Priscilla Burnaby, *Issues in Accounting Education*, Volume 26, Number 1, pp. 67-86, February 2011.  
 - American Taxation Association/Deloitte Teaching Innovation Award received for teaching innovation.
- 2 ["Die Unterschiede im Umfeld der Wirtschaftsprüfung – Ein Vergleich zwischen USA, Deutschland und Oesterreich"](#) ([Differences in the Audit Environment – An International Comparison of the U.S., Germany and Austria](#)), Brigitte Wudernitz, *Oesterreichische Zeitschrift für Recht und Rechnungswesen (Austrian Journal of Accounting)*, Volume 5, Issue 5, pp. 153-155, May 1995.

- 1 “Entwicklung der konsolidierten Besteuerung in den USA” (The Development of Consolidated Tax Returns in the U.S.), Brigitte Wudernitz, Österreichische Zeitschrift für Recht und Rechnungswesen (Austrian Journal of Accounting), Volume 4, Issue 5, pp. 126-128, May 1994.

## EDITORIALLY-REVIEWED ARTICLES

- 13 “ChatGPT and Accounting Education”, with Deniz Appelbaum, Hussein Issa, Margarita Lenk, Kevin Moffitt and Robert Nehmer, White Paper, a collaboration of the AAA Strategic and Emerging Technologies Section and Wiley, published online, August 2023.
- 12 “Statisticians Quietly Support Innovation Through Patents”, with Rick Cleary and Davit Khachatryan, AmStat News, October 2020.
- 11 “Emerging Skill Sets: Data Visualization,” with Chandler McKinley, SumNews (bi-monthly publication of the Massachusetts Society of Certified Public Accountants), September 2018, p. 16-19.
- 10 “Copilots with Entrepreneurs,” with Weerapat Attachot, William Coyle, and Paul Juras, Strategic Finance, August 2018, p. 60-66.
- 9 “CPAs: Success Starts with the Right Attitude,” SumNews, Summer I, 2015, p. 12-16.
- 8 “Socialization through Mentoring in the U.S. Public Accounting Profession,” with Sridhar Ramamoorti and Kathryn Epps, Connect (International Mentoring Association), pp. 14-15, 17, November 2014.
- 7 “Cross-border Charitable Giving and Its Tax Limitations,” Sabine Heidenbauer, Sigrid Hemels, Brigitte Muehlmann, Miranda Stewart, Otmar Thoemmes and Tina Tukic, IBFD Bulletin for International Taxation, Volume 67, Number 11, pp. 611-625, November 2013.
- 6 “Standards for International Activities and Grants of U.S. Charitable Organizations,” Brigitte Muehlmann, International Taxation, Volume 7, pp. 488-491, November 2012.
- 5 “Cross-Border Charitable Contributions,” Otmar Thoemmes and Brigitte Muehlmann, Tax Notes International, Volume 67, pp. 153-156, July 9, 2012.
- 4 “Internal Auditor’s Role in Finding Corruption,” Brigitte Muehlmann, Priscilla Burnaby and Martha Howe, Internal Auditing, Volume 25, Number 5, pp. 8-16, Sept/Oct 2010.
- 3 “Auswege aus den verschärften Verrechnungspreisbestimmungen Deutschlands bei grenzüberschreitenden Funktionsverlagerungen” (Ways Out of Germany’s Tightened Transfer Pricing Regulations Regarding the Cross-Border Transfer of Functions), Brigitte Muehlmann and Gerald Posautz, Steuer und Wirtschaft International (Tax and Business Review), Volume 19, Number 6, pp. 292-305, June 2009.
- 2 “Foreign Sales Corporation - Eine Steuerbegünstigung fuer Exporte aus den USA”(Foreign Sales Corporation—A Tax Incentive for Exports from the United States), Brigitte Wudernitz, Steuer und Wirtschaft International (Tax and Business Review), Volume 7, Number 9, pp. 407-411, September 1997.

- I “Foreign Sales Corporation/Advantages for US-Subsidiaries”, with Nora McStowe, published in German, Handelsblatt (comparable to *Wall Street Journal* in the U.S.), October 29, 1997.

## REFEREED CONFERENCE PROCEEDINGS

- 16 “Accounting accreditation standard A5: Information technology, data analytics and emerging technologies in the curriculum”, with Amelia Baldwin, Victoria Chiu and Qi Liu, American Accounting Association (AAA) Annual Meeting Proceedings, San Francisco, CA, August 2019.
- 15 “Bringing Data Analytics Research in Accounting into the Classroom: A Bibliometric Approach”, with Qi Liu, Victoria Chiu and Amelia Baldwin, AAA Annual Meeting Proceedings, San Francisco, CA, August 2019.
- 14 “Bringing Emerging Technologies Research into the Classroom: A Bibliometric Approach”, with Qi Liu, Victoria Chiu and Amelia Baldwin, Collected Papers of the Twenty-seventh Annual Research Workshop on Strategic and Emerging Technologies in Accounting, Auditing and Tax, AAA, Washington, D.C., August 2018.  
- Best Faculty Paper Award, Research Workshop on Strategic and Emerging Technologies in Accounting, Auditing and Tax, American Accounting Association
- 13 “A Bibliometric Analysis of Accounting Information Systems Journals and Their Emerging Technologies Contributions”, with Victoria Chiu, Qi Liu and Amelia Baldwin, Collected Papers of the Twenty-sixth Annual Research Workshop on Strategic and Emerging Technologies in Accounting, Auditing and Tax, AAA, San Diego, CA, August 2017.  
- Best Faculty Paper Award, Research Workshop on Strategic and Emerging Technologies in Accounting, Auditing and Tax, American Accounting Association
- 12 “Emerging Technologies Research in Accounting: JETA’s First Decade,” with Victoria Chiu and Qi Liu, American Accounting Association, AAA Annual Meeting Proceedings, Chicago, IL, August 2015.
- 11 “The Role of Special Masters in Federal Tax Cases as Identified in Court Opinions,” with Priscilla Burnaby, American Accounting Association, AAA Annual Meeting Proceedings, Atlanta, GA, August 2014.
- 10 “Socialization through Mentoring in the U.S. Public Accounting Profession,” with Sridhar Ramamoorti and Kathryn Epps. In Dominguez, N. & Gandert, Y. (Eds.). 6th Annual Mentoring Conference Proceedings: Impact & Effectiveness of Developmental Relationships. Albuquerque, NM: University of New Mexico, October 2013.
- 9 “Fighting International Fraud with the FCPA,” with Priscilla Burnaby and Susan Hass, AAA Annual Meeting Proceedings, Anaheim, CA, August 2013.
- 8 “Summary Witness Testimony in Federal Tax Litigation Cases,” with Priscilla Burnaby and Martha Howe, AAA Annual Meeting Proceedings, Washington DC, August 2012.
- 7 “Intelligent Agents for Tax Compliance: The Landscape of Patented Inventions,” Collected Papers of the 21<sup>st</sup> Annual Research Workshop on Strategic and Emerging Technologies, AAA, Washington, D.C., August 2012.

- 6 “Preliminary Thoughts on a Mentoring Education Module in the U.S. Accounting Curriculum,” with Wanny Baez, AAA Annual Meeting Proceedings, Denver CO, August 2011.
- 5 “Future Factory Academic Accounting Research Publications: An Exploratory Study of Evidence from Patented Inventions,” with Priscilla Burnaby, Collected Papers of the 19<sup>th</sup> Annual Research Workshop on Strategic and Emerging Technologies in Accounting, Auditing and Tax, AAA, San Francisco, CA, August 2010.
- 4 “Tax Strategy Patents: Intelligent or Just Useful for Tax Advising?” with Amelia Baldwin, Charles Hickman and Roland Hübscher, Collected Papers of the 17<sup>th</sup> Annual Research Workshop on Strategic and Emerging Technologies, AAA, Anaheim, CA, August 2008.
- 3 “Opportunities for AI Development in the Accounting Domain: The Case for Tax Advising” with Roland Hübscher and Amelia Baldwin, Collected Papers of the 16<sup>th</sup> Annual Research Workshop on Strategic and Emerging Technologies, AAA, Chicago, IL, August 2007.
- 2 “A Cognitive Model of Tax Problem Solving,” with Roland Hübscher, Collected Papers of the 15<sup>th</sup> Annual Research Workshop on Strategic and Emerging Technologies in Accounting, Auditing and Tax, AAA, Washington, D.C., August 2006.  
- Best Paper Award, Research Workshop on Strategic and Emerging Technologies, American Accounting Association
- 1 “Scaffolding Tax Professionals Using the Original Tax Code,” with Roland Hübscher, Collected Papers of the 14<sup>th</sup> Annual Research Workshop on Strategic and Emerging Technologies in Accounting, Auditing and Tax, AAA, Washington, San Francisco, August 2005.

## INVITED PUBLICATIONS

CFO aktuell: Zeitschrift für Finance und Controlling, comparable to *CFO Magazine* in the U.S., bi-monthly columnist, since the inaugural issue in January 2007. Titles:

“What’s up in Boston”

113 “Rechenzentren ueber den Wolken” (Data Centers Above the Clouds), Volume 20, Issue 4, p. xxx, July/August 2026.

112 “Future Skills fuer die KI-Aera” (Future Skills for the Age of AI), Volume 20, Issue 3, p. 140, May/June 2026.

111 “B Corporations”, Volume 20, Issue 2, p. 96, March/April 2026.

110 “Mensch und Maschine” (Human-machine Symbiosis), Volume 20, Issue 1, p. 52, Jan/Feb 2026.

109 “Bilanzen in VR: Die naechste Dimension der Finanzanalyse” (Financial Statements in Virtual Reality: The Next Dimension of Financial Analysis), Volume 19, Issue 6, p. 252, Nov/Dec 2025.

- 108 “Der CFO als Suendenbock?” (The CFO as Scapegoat?), Volume 19, Issue 5, p. 208, Sept/Oct 2025.
- 107 “Navigieren auf rauer See: Private-Equity- Unternehmen entern Wirtschaftskanzleien” (Navigating Rough Waters: Private Equity Firms Set Sail for CPA Firms), Volume 19, Issue 4, p. 172, July/August 2025.
- 106 “Gone Lobbying”, Volume 19, Issue 3, p. 128, May/June 2025.
- 105 “Quantum Computing”, Volume 19, Issue 2, p. 84, March/April 2025.
- 104 “Der Goodwill beim Unternehmenskauf” (Goodwill in Business Acquisitions), Volume 19, Issue 1, p. 44, Jan/Feb 2025.
- 103 “Trick and Treat”, Volume 18, Issue 6, p. 240, Nov/Dec 2024.
- 102 “Bridge the gap”, Volume 18, Issue 5, p. 196, Sept/Oct 2024.
- 101 “ChatGPT und die einzige Wahrheit” (ChatGPT and the Single Truth), Volume 18, Issue 4, p. 152, July/August 2024.
- 100 “Rugby im Unternehmen: Agiles Projektmanagement mittels Scrum-Methode” (Rugby in the Company: Agile Project Management Using the Scrum Method), Volume 18, Issue 3, p. 116, May/June 2024.
- 99 “Nachhaltigkeitsberichterstattung: Wo geht die Reise hin?” (Sustainability Reporting: Where is the journey headed?), Volume 18, Issue 2, p. 76, March/April 2024.
- 98 “Designing a Business for Profitability”, Volume 18, Issue 1, p. 40, Jan/Feb 2024.
- 97 “Erfolgsfaktor AI: Künstliche Intelligenz als Wachstumsfaktor“ (Success factor AI: Artificial Intelligence as a growth driver), Volume 17, Issue 6, p. 236, Nov/Dec 2023.
- 96 “Triple Entry Accounting”, Volume 17, Issue 5, p. 196, Sept/Oct 2023.
- 95 “General Electric”, Volume 17, Issue 4, p. 156, July/August 2023.
- 94 “March Madness”, Volume 17, Issue 2, p. 80, March/April 2023.
- 93 “Von Chabots und wahrer Nachhaltigkeit” (Of chatbots and true sustainability), Volume 17, Issue 1, p. 40, Jan/Feb 2023.
- 92 “Unternehmen gesucht” (Companies wanted), Volume 16, Issue 6, p. 236, Nov/Dec 2022.
- 91 “Beetle”, Volume 16, Issue 5, p. 199, Sept/Oct 2022.
- 90 “CFO fuer einen Tag” (CFO for one day), Volume 16, Issue 4, p. 156, July/Aug 2022.
- 89 “Ukraine-Krieg: Bostoner Unternehmen demonstrieren Solidarität” (War in Ukraine: Boston businesses demonstrate solidarity), Volume 16, Issue 3, p. 116, May/June 2022.
- 88 “NFTs – digital gepraeagte Kunstwerke” (NFTs – digitally shaped artworks), Volume 16, Issue 2, p. 76, March/April 2022.
- 87 “Fake it till you make it”, Volume 16, Issue 1, p. 34, Jan/Feb 2022.

“E-mail from Boston”

- 86 “Business Angels”, Volume 15, Issue 2, p. 84, March/April 2021.
- 85 “Hindsight 20/20”, Volume 15, Issue 1, p. 40, Jan/Feb 2021.
- 84 “Creating Social Value”, Volume 14, Issue 6, p. 240, Nov/Dec 2020.
- 83 “Raus aus der Krise!” (Let’s get out of the crisis!), Volume 14, Issue 5, p. 196, Sept/Oct 2020.
- 82 “Farewell or Goodbye?”, Volume 14, Issue 4, p.152, July/Aug 2020.
- 81 “Das Covid-19-Antibody-Rennen” (The COVID-19-Antibody-Race), Volume 14, Issue 3, p. 112, May/June 2020.
- 80 “Top of the Hub”, Volume 14, Issue 2, p. 72, March/April 2020.
- 79 “Das Charrette-Modell” (The Charrette-Model), Volume 14, Issue 1, p. 36, Jan/Feb 2020.
- 78 “Lux-Leaks fuer Amazon” (Lux-Leaks for Amazon), Volume 13, Issue 6, p. 240, Nov/Dec 2019.
- 77 “Dividendenrausch – Heiligt der Zweck die Mittel?” (Dividend Intoxication – Does the End Justify the Means?), Volume 13, Issue 5, p. 204, Sept/Oct 2019.
- 76 “Von Bullen, Baeren und Pflanzenproteinen: Der vegane Boersengang eines Hamburgers” (Of Bulls, Baers and Plant Proteins: The Vegan IPO of a Burger), Volume 13, Issue 4, p. 164, July/August 2019.
- 75 “Transportation as a Service – oder: Romeo und Julia 4.0” (Transportation as a Service – or: Romeo and Juliet 4.0), Volume 13, Issue 3, p. 124, May/June 2019.
- 74 “Der Schluessel zu lebenslanger Fitness” (The Key to Lifelong Fitness), Volume 13, Issue 2, p. 88, March/April 2019.
- 73 “McMansions und der Abo-Trend” (McMansions and the Subscription Trend), Volume 13, Issue 1, p. 40, Jan/Feb 2019.
- 72 “They Can’t See the Forest for the Trees”, Volume 12, Issue 6, p. 256, Nov/Dec 2018.
- 71 “Die wahre Geschichte der Balanced Scorecard” (The Real Story of the Balanced Scorecard), Volume 12, Issue 5, p. 219, Sept/Oct 2018.
- 70 “Moege der Bessere das Rennen gewinnen” (May the Better One Win the Race), Volume 12, Issue 4, p. 175, July/Aug 2018.
- 69 “Retro-Futurismus und Asset Management” (Retro-Futurism and Asset Management), Volume 12, Issue 3, p. 135, May/June 2018.
- 68 “Don’t Charge a Book by Its Cover”, Volume 12, Issue 2, p. 96, March/April 2018.
- 67 “Alles Roomba?” (Everybody Roomba?), Volume 12, Issue 1, p. 51, Jan/Feb 2018.
- 66 “Eine Gruseltour durch Waltham” (A Spooky Tour through Waltham), Volume 11, Issue 6, p. 252, Nov/Dec 2017.
- 65 “Meet Pepper, the Future Tax Expert”, Volume 11, Issue 5, p. 212, Sept/Oct 2017.

- 64 “Ein Reisepass fuer Berufsleben?” (A Passport for Professional Life?), Volume 11, Issue 4, p. 172, July/Aug 2017.
- 63 “A Better Way”, Volume 11, Issue 3, p. 132, May/June 2017.
- 62 “Das Spiel um den besten “Score”” (The Game for the Best Score), Volume 11, Issue 2, p. 88, March/April 2017.
- 61 “Die Blockchain als Heilmittel?” (The Blockchain As Cure?), Volume 11, Issue 1, p. 44, Jan/Feb 2017.
- 60 “Plattformunternehmen: menschenlose Vermittlungsagenturen?” (Platforms: Agencies without Humans?), Volume 10, Issue 6, p. 259, Nov/Dec 2016.
- 59 “The Future of Accounting in the Daylight”, Volume 10, Issue 5, p. 220, Sept/Oct 2016.
- 58 “Von Marshmallows and S'Mores” (Of Marshmallows and S'Mores), Volume 10, Issue 4, p. 172, July/August 2016.
- 57 “@Ray Tomlinson,” Volume 10, Issue 3, p. 131, May/June 2016.
- 56 “Der Klang von Fusionen” (The Sound of Mergers), Volume 10, Issue 2, p. 88, March/April 2016.
- 55 “Daten, Informationen und Einfallsreichtum” (Data, Information and Ingenuity), Volume 10, Issue 1, p. 39.
- 54 “Der geheimnisvolle Klub der Einhoerner” (The Secretive Club of the Unicorns), Volume 9, Issue 6, p. 276, Nov/Dec 2015.
- 53 “Reflexionen im Rechnungswesen” (Reflections in Accounting), Volume 9, Issue 5, p. 232, Sept/Oct 2015.
- 52 “Boston Goes Olympic”, Volume 9, Issue 4, p. 184, July/Aug 2015.
- 51 “Laecheln statt Burn-out” (Smiling instead of Burn-out), Volume 9, Issue 3, p. 144, May/June 2015.
- 50 “In voller Pracht” (In Full Splendor), Volume 9, Issue 2, p. 96, March/April 2015.
- 49 “Rezepte und andere Betriebsgeheimnisse” (Recipes and Other Trade Secrets), Volume 9, Issue 1, p. 48, Jan/Feb 2015.
- 48 “In der Kuerze liegt die Wuerze” (The Gist Rests in Brevity), Volume 8, Issue 6, p. 240, Nov/Dec 2014.
- 47 “Safety in Numbers,” Volume 8, Issue 5, p. 203, Sept/Oct 2014.
- 46 “Im gruenen Bereich” (In the Green Zone), Volume 8, Issue 4, p. 160, July/Aug 2014.
- 45 “Ready, Set, Go!” Volume 8, Issue 3, p. 120, May/June 2014.
- 44 “Safety First,” Volume 8, Issue 2, p. 80, March/April 2014.
- 43 “Mut zur Erneuerung” (Courage for Renewal), Volume 8, Issue 1, p. 40, Jan/Feb 2014.
- 42 “Schoepferische Zerstoerung” (Creating Destruction), Volume 7, Issue 6, p. 228, Nov/Dec 2013.

- 41 "Brain Management", Volume 7, Issue 5, p. 187, Sept/Oct 2013.
- 40 "Zwischen Kunst und Wissenschaft" (Between Art and Science), Volume 7, Issue 4, p. 148, July/Aug 2013.
- 39 "Keep on Running", Volume 7, Issue 3, p. 108, May/June 2013.
- 38 "Cloud Computing", Volume 7, Issue 2, p. 72, March/April 2013.
- 37 "Goodwill Hunting: Was ist ein Geschaeft wert?" (Goodwill Hunting: What is the Value of A Business?), Volume 7, Issue 1, p. 36, Jan/Feb 2013.
- 36 "Trial and Error", Volume 6, Issue 6, p. 240, Nov/Dec 2012.
- 35 "Der Controller als Philosoph" (The Controller as a Philosopher), Volume 6, Issue 5, p. 200, Sept/Oct 2012.
- 34 "Motivation und Zufriedenheit" (Motivation and Satisfaction), Volume 6, Issue 4, p. 160, July/Aug 2012.
- 33 "Facebook und der Wert des Einzelnen" (Facebook and the Value of the Individual), Volume 6, Issue 3, May/June 2012.
- 32 "Treffsicher in Hollywood" (Unerring in Hollywood), Volume 6, Issue 2, p. 80, March/April 2012.
- 31 "Falken und andere Raubtiere ..." (Hawks and Other Predators ...), Volume 6, Issue 1, p. 40, Jan/Feb 2012.
- 30 "Mein PC ist nicht irgendein Computer" (My PC is not Any Computer), Volume 5, Issue 6, p. 236, Nov/Dec 2011.
- 29 "Know-how fuer den Alltag" (Know-how for Everyday Life), Volume 5, Issue 5, p. 196, Sept/Oct 2011.
- 28 "Spare in der Zeit – doch wie und wo?" (Save When Times Are Good – But How and Where?), Volume 5, Issue 4, p. 156, July/Aug 2011.
- 27 "Unser neuer CFO – ein Roboter?" (Our New CFO – a Robot?) Volume 5, Issue 3, p. 120, May/June 2011.
- 26 "Learning by Doing: Case Studies," Volume 5, Issue 2, p. 80, March/April 2011.
- 25 "Vom CFO zum CPO" (From the CFO to the CPO), Volume 5, Issue 1, p. 44, Jan/Feb 2011.
- 24 "In einem neuen Licht" (In a New Light), Volume 4, Issue 6, p. 243, Nov/Dec 2010.
- 23 "Gier ist gut, und Geld schlaeft nie " (Greed is Good, and Money Never Sleeps ...), Volume 4, Issue 5, p. 204, Sept/Oct 2010.
- 22 "Alles neu macht der – September" (A New Beginning – in September) Volume 4, Issue 4, p. 164, July/Aug 2010.
- 21 "Mit Mass und Ziel" (Knowing Your Metes and Bounds), Vol. Volume 4, Issue 3, p. 128, May/June 2010.
- 20 "Das Geld macht die Musik?" (Does Money Make the World Go Round?), (Volume 4, Issue 2, p. 88, March/April 2010.

- 19 “Doppelt haelt besser” (Better Safe than Sorry), Volume 4, Issue 1, p. 40, Jan/Feb 2010.
- 18 “Auf Schnäppchenjagd” (On a Bargain Hunt), Volume 3, Issue 6, p. 276, Nov/Dec 2009.
- 17 “Time to Say Goodbye,” Volume 3, Issue 5, p. 228, Sept/Oct 2009.
- 16 “Virtueller Hausbau” (Virtual Home Building), Volume 3, Issue 4, p. 184, July/Aug 2009.
- 15 “Eine verhängnisvolle Affäre,” (A Calamitous Affair), Volume 3, Issue 3, p. 139, May/June 2009.
- 14 “Der Unterschied zwischen Reich und Reich” (The Difference Between Rich and Rich), Volume 3, Issue 2, p. 92, March/April 2009.
- 13 “Mit offenen Karten” (With Open Cards), Volume 3, Issue 1, p. 48, Jan/Feb 2009.
- 12 “Time for a Change,” Volume 2, Issue 6, p. 260, Nov/Dec 2008.
- 11 “Für einen Krug Bier und Sicherheit” (For a Mug of Beer and Security), Volume 2, Issue 5, p. 216, Sept/Oct 2008.
- 10 “Should I Stay, or Should I Go?” Volume 2, Issue 4, p. 176, July/Aug 2008.
- 9 “Alles unter Kontrolle?” (Everything under Control?), Volume 2, Issue 3, p. 128, May/June 2008.
- 8 “Hände weg von Steuern” (Hands off Taxes), Volume 2, Issue 2, p. 84, March/April 2008.
- 7 “Das Eigenheim als Hypothek” (The Home as a Mortgage), Volume 2, Issue 1, p. 44, Jan/Feb 2008.
- 6 “Never Change a Winning Team!” Volume 1, Issue 6, p. 292, Nov/Dec 2007.
- 5 “Auf zu neuen Ufern!” (Off to New Shores), Volume 1, Issue 5, p. 244, Sept/Oct 2007.
- 4 “Rien ne va plus ...” (End of Bets), Volume 1, Issue 4, p. 195, July/Aug 2007.
- 3 “Schlaflos in Boston” (Sleepless in Boston), Volume 1, Issue 3, p. 140, May/June 2007.
- 2 “Vom mittellosen Einwanderer zum Money Marketeer” (From a Penniless Immigrant to a Money Marketeer), Volume 1, Issue 2, p. 92, March/April 2007.
- 1 “Boston – eine Stadt mit vielen Gesichtern” (Boston – A City with Many Faces), Volume 1, Issue 1, p. 44, Jan/Feb 2007.

## BOOK REVIEWS

- 9 “Comparative Taxation: Why Tax Systems Differ,” by Chris Evans, John Hasseldine, Andy Lymer, Robert Ricketts and Cedric Sandford, in: Journal of the American Taxation Association, Volume 341 Issue 2, pp. 127-128, Fall 2019.
- 8 “Inventology,” by Pagan Kennedy, in Babson Insights – Business Strategy, Summer 2016.
- 7 “Making Tax Law,” by Daniel Berman and Victoria Haneman, Carolina Academic Press, 2014, in: Journal of the American Taxation Association, Volume 37, Issue 2, pp. 177-179, Fall 2015.

- 6 "Federal Taxation," by James Pratt and William Kulsrud, Cengage Learning, 2013, in: Journal of the American Taxation Association, Volume 36, Issue 1, pp. 196-198, Spring 2014.
- 5 "Principles of International Taxation," by Angharad Miller and Lynne Oats, Tottel Publishing Ltd., Haywards Heath, UK, 2006, in: Journal of the American Taxation Association, Volume 30, Issue 1, pp. 131-132, Spring 2008.
- 4 "Taxation of International Transactions: Materials, Text and Problems," by Charles H. Gustafson, Robert J. Peroni and Richard Crawford Pugh, Third Edition, Thomson/West, St. Paul, MN, 2006, in: Journal of the American Taxation Association, Volume 29, Issue 1, pp. 125-127, Spring 2007.
- 3 "EU Taxation Law," by Lawrence W. Gormley, Richmond Law & Tax, Richmond, UK, 2005, in: Journal of the American Taxation Association, Volume 28, Issue 2, pp. 110-112, Fall 2006.
- 2 "The Encyclopedia of Taxation & Tax Policy," by Joseph J. Cordes, Robert D. Ebel and Jane G. Granville (Editors), The Urban Institute Press, Washington, D.C., 2005, in: Journal of the American Taxation Association, Volume 28, Issue 2, pp. 109-110, Fall 2006.
- 1 "The International Taxation System," by Andrew Lymer and John Hasseldine (Editors), Kluwer Academic Publishers, Boston, MA, 2002, in: Journal of the American Taxation Association, Volume 25, Issue 2, pp. 64-65, Fall 2003.

## PRESENTATIONS

### PEER-REFEREED PRESENTATIONS

- 61 ["Sustainability Butterfly"](#), AAA Annual Meeting, Washington, D.C., August 2024.
- 60 ["Best Practices of Integrating Business Sustainability and ESG Sustainability into Business and Accounting Curricula"](#) (Panel with Sri Ramamoorti, chaired by Zabihollah Rezaee), AAA Sustainability, ESG and Accounting Conference, Washington, D.C., February 2024.
- 59 ["You are Going to Teach an ESG Course: Where do you Begin?"](#) (Panel with Barbara Porco and Kerri-Ann Sanderson, chaired by Joni Fisher), AAA Sustainability, ESG and Accounting Conference, Washington, D.C., February 2024.
- 58 ["Global Tax Policy Statements in ESG Factors"](#) (with Nishith Mitran), AAA Annual Meeting, Aurora, CO, August 2023.
- 57 ["ESG Regulatory Landscape Developments \(U.S. SEC vs. INTL\)"](#), (Panel Chair, with Anita Chan, Bryce Ehrhardt, and Courtney Smith), AAA Annual Meeting, Aurora, CO, August 2023.
- 56 ["Introducing CECL: Adapting Bad Debt Expense Estimates"](#), AAA Annual Meeting, Aurora, CO, August 2023.
- 55 ["Integrating Business Sustainability into Business and Accounting Curricula"](#), AAA Conference on Sustainability, ESG, and Accounting: Implications for the Academy and the Profession, Washington, D.C., February 2023.
- 54 ["Introducing Stakeholder Capitalism: Its Natural Alignment with the Organization of an Income Statement"](#), AAA Annual Meeting, San Diego, August 2022.
- 53 ["Integrating Financial and Sustainability Reporting: An Intuitive Health-Analogical Model"](#), AAA Annual Meeting, Virtual, August 2021.
- 52 ["Entrepreneurial Practices & Accounting: A Circular Approach for Design Thinkers"](#), AAA Annual Meeting, San Francisco, CA, August 2019.
- 51 ["The Cash Flow Statement at Thirty: An Exploration of Presentation Choices"](#) (with William Coyle), AAA Annual Meeting, San Francisco, CA, August 2019.
- 50 ["Accounting Accreditation Standard A5: Information Technology, Data Analytics and Emerging Technologies in The Curriculum"](#) (author only, Victoria Chiu and Qi Liu presented), AAA Annual Meeting, San Francisco, CA, August 2019.
- 49 ["Bringing Data Analytics Research in Accounting into the Classroom: A Bibliometric Approach"](#) (presented with Qi Liu, Victoria Chiu), AAA Annual Meeting, San Francisco, CA, August 2019.
- 48 ["Uncovering Insight from Patent Data using Text Mining"](#) (author only, Davit Khachatryan presented), INFORMS Annual Meeting, Phoenix, AZ, November 2018.

- 47 ["Sustainability at Interface, Inc.: Applying the qualitative characteristics of useful financial information to environmental, social and governance \(ESG\) factor data"](#), AAA Annual Meeting, Washington, D.C., August 2018.
- 46 ["A Bibliometric Analysis of Accounting Information Systems Journals and Their Emerging Technologies Contributions"](#), AAA Annual Meeting, Washington, D.C., August 2018.
- 45 ["Developing Accountants' Innovative Minds"](#), AAA Annual Meeting, Washington, D.C., August 2018.
- 44 ["Developing Accounting Students' Innovative Minds"](#), 11<sup>th</sup> Annual Conference on Teaching and Learning (CTLA), Washington, D.C., August 2018.
- 43 ["Bringing emerging technology research in accounting classrooms: A bibliometric approach"](#), with Qi Lui, Victoria Chiu and Amelia Baldwin, Twenty-seventh Annual Research Workshop on Strategic and Emerging Technologies in Accounting, Auditing and Tax, held in conjunction with the Annual Meeting of the AAA, Washington, D.C., August 2018.
- 42 ["Opportunities for Intelligent Tax Compliance Based on Patented Inventions"](#), with Davit Khachatryan, 41<sup>st</sup> World Continuous Auditing and Reporting Symposium, Huelva, Spain, November 2017.
- 41 ["The Accountant' and the Error of His Ways"](#), based on an excerpt from the movie *The Accountant* with Ben Affleck and Ann Kendrick, with Virginia Soybel and Robert Turner, AAA Annual Meeting, San Diego, CA, August 2017.
- 40 ["A Bibliometric Analysis of Accounting Information Systems Journals and Their Emerging Technologies Contributions"](#), with Victoria Chiu and Qi Liu, Twenty-sixth Annual Research Workshop on Strategic and Emerging Technologies in Accounting, Auditing and Tax, held in conjunction with the Annual Meeting of the AAA, San Diego, CA, August 2017.
- 39 ["Using Tableau for Visual Storytelling,"](#) with Chuck Hooper, Sunita Goel, Richard Newmark and Brad Trinkle, 9<sup>th</sup> Annual Conference on Teaching and Learning (CTLA), New York, August 2016.
- 37 ["Visual Storytelling in the First Accounting Course,"](#) with Chuck Hooper, Sunita Goel,
- 38 Richard Newmark and Brad Trinkle, Eighteenth Annual Accounting Information Systems Educators Conference, Colorado Springs, June 2016; American Accounting Association (AAA) Annual Meeting, New York, August 2016.
- 36 ["Panel on Fraud: Big Problems Need Big Data,"](#) with William Beecken, Toby Bishop, Sridhar Ramamoorti and Lynda Schwartz, AAA SouthEast Regional Meeting, Atlanta, GA, April 2016.
- 35 ["Emerging Technologies Research in Accounting: JETA's First Decade,"](#) with Victoria Chiu and Qi Liu, AAA Annual Meeting, Chicago, IL, August 2015.
- 34 ["Hold the tension, please!" \(in accounting as in yoga\),](#) AAA Annual Meeting, Chicago, IL, August 2015.

- 33 “AACSB AZ,” Panel Presentation, AAA Annual Meeting, Atlanta, GA, August 2014.
- 32 “Big Data Analytics,” organizer and chair of panel with Faye Chua, Bob Cuthbertson and Lynda Schwartz, AAA Annual Meeting, Atlanta, GA, August 2014.
- 31 “The Role of Special Masters in Federal Tax Cases as Identified in Court Opinions,” AAA  
30 Mid-Atlantic Regional Meeting, King of Prussia, PA, April 2014; AAA Annual Meeting, Atlanta, GA, August 2014.
- 29 “UNHIDE Professors’ Research: Tax Students Synthesize Empirical Papers,” AAA, Annual Meeting, Anaheim, CA, August 2013.
- 28 “A Spoonful of Technology (Sugar) Makes the Tax-Learning (Medicine) Go Down,” 7<sup>th</sup>  
27 Knowledge Globalization Conference, Boston, MA, November 2012; AAA, Annual Meeting, Anaheim, CA, August 2013.
- 26 “Fighting International Fraud with the FCPA,” with Priscilla Burnaby and Susan Hass, AAA,  
25 2013 Forensic and Investigative Accounting Section Meeting, New Orleans, LA, March 2013, and AAA, Annual Meeting, Anaheim, CA, August 2013.
- 24 “CEDAR - A Method for Issue Resolution in Tax Practice in Five Steps,” AAA, Annual  
23 Meeting, Washington, D.C., August 2012; Northeast Region Meeting, Providence, RI, October 2012.
- 22 “Summary Witness Testimony in Federal Tax Litigation Cases,” with Priscilla Burnaby,  
21 AAA, 2012 South-East Regional Meeting, Savannah, GA, April 2012; Forensic and  
20 Investigative Accounting Section Meeting, Chicago, IL, March 2012; AAA Annual Meeting, Washington, D.C., August 2012.
- 19 “Intelligent Agents for Tax Compliance: The Landscape of Patented Inventions,” Twenty-  
First Annual Research Workshop on Artificial Intelligence and Emerging Technologies in  
Accounting, Auditing and Tax, held in conjunction with the Annual Meeting of the AAA,  
Washington, D.C., August 2012.
- 18 “Artificial Intelligence in Tax Compliance – Evidence from Patented Inventions,” AAA,  
Diversity Section Meeting, Fort Lauderdale, FL, November 2011.
- 17 “A Study of the Use of Forensic Accounting Experts in Tax Litigation,” with Priscilla  
Burnaby, AAA, AAA, Forensic and Investigative Accounting Section Meeting,  
New Orleans, LA, March 2011.
- 16 “Preliminary Thoughts on a Mentoring Education Module in the U.S. Accounting  
15 Curriculum,” with Wanny Baez, AAA, Annual Meeting, Denver, CO, August 2011 and  
AAA, Diversity Section Meeting, Atlanta, GA, November 2010.
- 14 “Future Factory Academic Accounting Research Publications: An Exploratory Study of  
Evidence from Patented Inventions,” Nineteenth Annual Research Workshop on Artificial  
Intelligence and Emerging Technologies in Accounting, Auditing and Tax, held in  
conjunction with the Annual Meeting of the AAA, San Francisco, CA, August 2010.

- 13 "Detecting Fraud in the Organization: An Internal Audit Perspective Research Proposal," with Priscilla Burnaby and Martha Howe, AAA, 1<sup>st</sup> Forensic and Investigative Accounting Section Meeting, Baton Rouge, LA, May 2010.
- 12 "Does the domestic "Kiddie Tax" application of the foreign earned income definition discourage student entrepreneurship?" with Wanny Baez, AAA, Northeast Regional Meeting, Cambridge, MA, November 2009.
- 11 "Cultivating the Five Minds for the Future in a Tax Course," AAA, Annual Meeting, Anaheim, CA, August 2008.
- 10 "Tax Strategy Patents: Intelligent or Just Useful for Tax Advising?" Seventeenth Annual Research Workshop on Artificial Intelligence and Emerging Technologies in Accounting, Auditing and Tax, Annual Meeting of the AAA, Anaheim, CA, August 2008.
- 9 "The Travels of a T-Shirt in the Global World of Taxation," AAA, North East Regional Meeting, Hartford, CT, April 2007; Annual Meeting, Chicago, IL, August 2007.
- 8
- 7 "Opportunities for AI Development in the Accounting Domain: The Case for Tax Advising," Sixteenth Annual Research Workshop on Artificial Intelligence and Emerging Technologies in Accounting, Auditing and Tax, held in conjunction with the Annual Meeting of the AAA, Chicago, IL, August 2007.
- 6 "A New Tax Advice Presentation Framework for Business Practice," AAA, Annual Meeting, Washington, D.C., August 2006.
- 5 "A Cognitive Model of Tax Problem Solving," Fifteenth Annual Research Workshop on Artificial Intelligence and Emerging Technologies in Accounting, Auditing and Tax, held in conjunction with the Annual Meeting of the AAA, Washington, D.C., August 2006.
- 4 "Income Tax Treatment of Expatriation and the Knowledge Worker: A Comparative Analysis of Developments in the U.S. and Austria," AAA, North East Regional Meeting, Portsmouth, NH, April 2006.
- 3 "Socialization through Mentoring in the U.S. Public Accounting Profession: Historical and Contemporary Perspectives," with Sri Ramamoorti, The Academy of Accounting Historians and The Accounting Hall of Fame Research Conference, Columbus, OH, October 2005.
- 2 "Re-Connecting Students of Taxation with the Internal Revenue Code," Annual Meeting of the AAA, San Francisco, CA, August 2005.
- 1 "Developments in Income Taxation Treatment of Emigration in the United States and Austria: Will the New Solutions Lead to Brain Gain or Brain Drain?" ALSB Annual Conference, San Francisco, CA, August 2005.

## INVITED PRESENTATIONS

### *Paper Discussions at Academic Conferences*

- 44 Discussion of “[Simulations of IoT: Measures of Audit Risk](#)”, by Zamil Alzamil, Deniz Appelbaum and Robert Nehmer, AAA Global Connect (formerly Annual Meeting), Las Vegas, NV, August 2026.
- 43 Discussion of “[Design of Unified Governance Models for Digital Environments](#)”, by Severin Grabski and Daniel Armani, AAA Joint Midyear Meeting of the AIS and SET Sections, Provo, UT, February 2026.
- 42 Discussion of “[Enhancing the Evaluation of Cybersecurity Disclosures: The Application of Large Language Models in Predicting Operational Risks](#)”, by Hongmin Du, Xiao Li and Linda Du, AAA Joint Midyear Meeting of the AIS and SET Sections, Provo, UT, February 2026.
- 41 Discussion of “[Do accounting historians need theory—made-to-measure or off-the-peg?](#)”, by Alan Sangster, AAA Accounting History Workshop, online, December 2025.
- 40 Discussion of “[The Roles of Accounting in Indian Society before European Colonization](#)”, by Richard Baker, AAA Accounting History Workshop, online, May 2025.
- 39 Discussion of “[DEI Score Creation, Reporting, and Their Link to Firm Performance](#)”, by Maureen Mascha, Benita Gullkvist, Laurie Burney and Timothy King, AAA Annual Meeting, Washington, D.C., August 2024.
- 38 Discussion of “[Like-Kind Exchanges in the United States and Germany: A Comparative Study of Tax Planning and Tax Policy Considerations](#)”, by Jonathan Grossberg and Timo Herbsthofner, American Taxation Association, Mid-Year Meeting, Washington, D.C., February 2023.
- 37 Discussion of “[The Case of Operational Internal Audit Being Replaced by Financial Internal Audit: Governance Options](#)”, by Gary Spraakman, AAA Annual Meeting, San Diego, CA, August 2022.
- 36 Discussion of “[The COVID-19 Black Swan: Auditing Uncertainty](#)”, by Deniz Appelbaum, Danielle R. Lombardi, and Janice Sipior, AAA Annual Meeting, San Diego, August 2022.
- 35 Discussion of “[Mapping Half a Century Peer-Reviewed Research on Corporate Governance Using Topic Modeling \(1970–2021\)](#)”, by Ferhat Zengul, Stephanie Yates, and James D. Byrd, AAA Annual Meeting, Virtual, August 2021.
- 34 Discussion of “[RPA to Mitigate Covid-19 and Post-Covid-19-Induced Accounting Work Alterations](#)”, by Deniz Appelbaum and Stephen Kozlowski, AAA Annual Meeting, Virtual, August 2021.
- 33 Discussion of “[Extending Robson’s Inscriptions to Management Accounting with Historical Verification](#)”, by Gary Spraakman, York University, AAA Annual Meeting, Virtual, August 2021.

- 32 Discussion of “The Shift to Market Based Sourcing for Apportioning Service Revenue: Public Interest Implications”, by Blaise Sonnier and Nancy Nichols, American Taxation Association, Mid-Year Meeting, Virtual, February 2021.
- 31 Discussion of “Do firms provide timely and informative disclosures in an environment of extreme uncertainty? Evidence from the COVID-19 pandemic”, by Theophanis C. Stratopoulos, Xiaoqi Wang, and Betty Xing, AAA Joint Mid-Year Meeting of the AIS and SET Sections, Virtual, February 2021.
- 30 Discussion of “A Model to Integrate Data Analytics in the Undergraduate Accounting Curriculum”, by Ghaleb El Refae, Hussein Issa, Amer Qasim, and Alexander J. Sannella, AAA Annual Meeting, Virtual, August 2020.
- 29 Discussion of “Corporate Social Responsibility (CSR) and Earnings Management (EM): An Analysis from the National Culture Perspective”, by Roberto Carlos Klann, Caroline Keidann Soschinski, and Moacir Manoel Rodrigues Junior, AAA Annual Meeting, Virtual, August 2020.
- 28 Discussion of “Revealing Research Themes and Trends in the Thirty Top Ranked Accounting Journals through Natural Language Processing (NLP): 1997-2017”, by Ferhat D. Zengul, Nurettin Oner, Arline Savage and James D. Byrd, AAA Annual Meeting, San Francisco, CA, August 2019.
- 27 Discussion of “MBA, MSA, and MST: Do They Make a Difference on CPA Exam Performance?”, by Dennis Blin and Xiaochuan Zheng, AAA Annual Meeting, San Francisco, CA, August 2019.
- 26 Discussion of “An Historical Review and Assessment of U.S. Railroad Accounting and Reporting”, by Dale L. Flesher and Gary J. Previts, AAA Annual Meeting, San Francisco, CA, August 2019.
- 25 Discussion of “Do Gatekeepers of Taxation Need More Ethics and Enforcement to Move the Needle of Compliance North?”, by Linval Frazer, AAA North-East Regional Meeting, Greenwich, CT, October 2018.
- 24 Discussion of “Antecedents of the International Association of Accounting Education and Research (1966–1983): The Initiatives of Raymond J. Chambers, Adolf Enthoven, and Seigo Nakajima”, by Graeme Dean, Frank Clarke and Martin Persson, AAA Annual Meeting, Washington, D.C., August 2018.
- 23 Discussion of “Distinguishing Independent Contractors from Employees: Analyzing Company Practices and Compensation Data to Assess Compliance with IRS Factors”, by Faye Borthick and Lucia Smeal, AAA, Annual Meeting, San Diego, CA, August 2017.
- 22 Discussion of “Elmer G. Beamer and the AICPA: The Pursuit of a Cognitive Standard for the Accounting Profession,” by Martin Persson, AAA Annual Meeting, New York, NY, August 2016.

- 21 Discussion of "[Cross-Country Evidence on the Role of Independent Media in Constraining Tax Avoidance](#)," by Kiridaran Kanagaretnam, Jimmy Lee, Chee Yeow Lim and Gerald Lobo, AAA, Annual Meeting, Chicago, IL, August 2015.
- 20 Discussion of "[Controversies in Aircraft Use Tax](#)," by Cheryl Crespi, AAA Mid-Atlantic Region Meeting, King of Prussia, PA, April 2014.
- 19 Discussion of "[International GAAP Differences and Debt Contracting](#)," by Anna Bergman Brown, AAA, Northeast Region Meeting, October 2013.
- 18 Discussion of "[Professional Ethics in Post-Depression America in The Ethics of a Profession by A.P. Richardson](#)," by Diane Roberts, AAA, Annual Meeting, Anaheim, CA, August 2013.
- 17 Discussion of "[The Implications of XBRL for the Financial Statement Audit](#)," by Roger Debreceny, Stephanie Farewell, and Hans Verkruijsse, AAA, Annual Meeting, Washington, D.C., August 2012.
- 16 Discussion of "[Tax Regimes and Capital Gains Realizations](#)," by Martin Jacob, AAA, Annual Meeting, Washington, D.C., August 2012.
- 15 Discussion of "[Compliance Cost of the U.S. Individual Income Tax: Another Look After Electronic Filing](#)," by Tracy Manly, Deborah Thomas, Bruce Dixon and Christina Ritsema, 17<sup>th</sup> Annual Ethics Research Symposium of the AAA, Washington, D.C., August 2012.
- 14 Discussion of "[Engaging the "Millenials." Incorporating Eco-Friendly Incentives into the Undergraduate Tax Curriculum](#)," by Monique O. Durant, AAA, Northeast Regional Meeting, Burlington, VT, October 2010.
- 13 Discussion of "[Supreme Court to Decide Whether Medical Residents are Students for FICA Purposes](#)," by Laura Lee Mannino, AAA, Burlington, VT, October 2010.
- 12 Discussion of "[Accounting Variables and Public Market Conditions Influencing Corporate Venture Capital Cyclicity](#)," by Felix Cardenas, Tony Davila and Daniel Oyon, AAA, Annual Meeting, San Francisco, August 2010.
- 11 Discussion of "[Accounting in Iraq Babylon: A Historical Perspective](#)," by Fouad Alnajjar, AAA, Annual Meeting, Anaheim, CA, August 2008.
- 10 Discussion of "[Who Has Really Paid for the Reconstruction of Eastern Germany? Expected and Realized Returns on Real Estate Investments in East and West Germany in the 1990s](#)," by Tina Bensemann and Dirk Kiesewetter, AAA, Annual Meeting, Anaheim, CA, August 2008.
- 9 Discussion of "[Auditor's Independence: Increasing Expectations and Expanding Responsibilities in the Early 1930s](#)," AAA, Annual Meeting, Chicago, IL, August 2007.
- 8 Discussion of "[A Split Develops in the Circuit Courts over Whether Early Retirement Payments Made to Tenured Faculty Are Subject to FICA Taxes](#)," AAA, Annual Meeting, Chicago, IL, August 2007.

- 7 Discussion of "[A Guide to Venue Rules in Federal Tax Disputes](#)," by Robert Blatz, AAA, Annual Meeting, Washington, D.C., August 2006.
- 6 Discussion of "[The Tax-Clientele Effects and the Capitalization of Shareholder-Level Dividend Tax: Evidence from Taiwan](#)," by Wanncherng Wang and Li-Hsiang Wang, AAA, Annual Meeting, Washington, D.C., August 2006.
- 5 Discussion of "[RICO Alert! The Filing of Fraudulent Sales Tax Returns Is Held to Subject the Filer to Civil RICO Claims by A Competitor in The Second Circuit and The Supreme Court has Granted Certiorari](#)," by Mark Aquilo, AAA Northeast Regional Meeting, Portsmouth, NH, April 2006.
- 4 Discussion of "[Audit Companies: Emergence, Prevalence, and Prominence of Public Accounting Firms Organized as Corporations in the United States Accounting Profession](#)," by James McKinney, AAA, Annual Meeting, San Francisco, CA, August 2005.
- 3 Discussion of "[Threats Followed by An Amnesty Period: Characteristics of Taxpayers Who Respond to This Compliance Strategy](#)," by Christina Ritsema, Deb Thomas and Tracy Manley, AAA, 8<sup>th</sup> Symposium on Ethics Research in Accounting, Honolulu 2003.
- 2 Discussion of "[Determining the Casual Factors in Measuring Harmonisation: A Case Study of Public Listed Companies in Queensland](#)," by Betty Chan, AAA, Northeast Regional Meeting, Stanford, CT, April 2003.
- 1 Discussion of "[The Potential Impact on U.K. Companies of Impairment Tests for Goodwill Instead of Amortization](#)," by Richard Baker and Robert Wearing, AAA, Northeast Regional Meeting, Providence, RI, April 2002.

#### *Talks to Scholarly-Oriented Groups*

- 56 "[Encouraging graduates to realize their life's purpose](#)", Last Lecture, Olin Graduate School, Babson College, May 2026.
- 55 "[Babson Lessons in Local Context](#)", Last Lecture, Olin Graduate School, Babson College, May 2025.
- 54 "[From Student to Teacher](#)", Last Lecture, Olin Graduate School, Babson College, May 2024.
- 53 "[Ideas for JLTR Scholarship Based on IRA 2022 Energy Credits for Businesses](#)", author, with Lynn Comer-Jones, American Taxation Association, Mid-Year Meeting, Long Beach, CA, February 2024.
- 52 "[IoT measures ESG: On the Path to Net Zero?](#)", Babson Research Day, Wellesley, MA, January 2024.
- 51 "[IoT measures ESG](#)", World Continuous Auditing and Reporting Symposium (WCARS), Rutgers University, Newark, NJ, November 2023.

- 50 ["Purpose-Driven Business in the Age of AI"](#) (Second Edition), Welcome Lecture, Olin Graduate School, Babson College, April 2023.
- 49 ["Demystifying ESG"](#), AICPA Faculty Hour, Virtual, November 2022.
- 48 ["Purpose-Driven Business in the Age of AI"](#), First Lecture, Olin Graduate School, Babson College, January 2022.
- 47 ["ESG Demystified"](#), with Chris Lloyd, Lewis Institute, Babson College, Wellesley, MA, October 2021.
- 46 ["Multi-National ESG Reporting and Assurance in Practice: Consistency and Comparability"](#), Panel Chair at AAA Annual Meeting, Virtual, August 2021.
- 45 ["Entrepreneurial leadership - purpose-driven social activities"](#), First Lecture, Olin Graduate School, Babson College, May 2021.
- 44 ["Practice Meaning"](#), Last Lecture, Olin Graduate School, Babson College, May 2021.
- 43 ["Spotlighting Sustainable Investing at Babson College"](#), Cutler Center for Investments and Finance, Babson College, April 2021.
- 42 ["Bringing Scholarly Data Analytics Knowledge Using Emerging Technology Tools in Accounting into Classrooms"](#), AAA weARE Webinar, March 2021.
- 41 ["A Purpose-Driven Accounting Curriculum"](#), BOW BIG Ideas Event, Virtual, December 2020.
- 40 ["Integrating Business Sustainability - Corporate Governance and Organization Ethics into Business and Accounting Curricula"](#), Panelist at AAA Annual Meeting, Virtual, August 2020.
- 39 ["AIS Journal Editors"](#), Panel Chair assembling the editors from leading AIS journals, AAA Annual Meeting, Virtual, August 2020.
- 38 ["Quantifying Purpose"](#), with Chris Lloyd, Lewis Institute, Babson College, Wellesley, M A, May 2020.
- 37 ["Accounting for Sustainability Is the Pathway to a Sustainable Future!"](#), Panelist at AAA Annual Meeting, San Francisco, CA, August 2019.
- 36 ["Effective Learning Strategies Teaching Award Winners"](#), Panelist at AAA Annual Meeting, San Francisco, CA, August 2019.
- 35 ["Mark Chain/FSA 2018 Innovation in Graduate Teaching Award"](#), Conference on Teaching and Learning in Accounting, San Francisco, CA, August 2019.
- 34 ["Expert Roles for Accountants in Tax Cases"](#), AAA Forensic Accounting Research Conference 2019, St. Louis, MO, March 2019.

- 33 “Measuring Impact”, Panelist, Lewis Institute & The Cutler Center for Investments and Finance, Babson College, Wellesley, MA, February 2019.
- 32 “Tax Scholarship in Europe: Multidisciplinary, Interdisciplinary and Critical Perspectives”, Panel Chair introducing the Concept of Social Relations in Tax Administration, ATA Mid-Year Meeting, New Orleans, LA, February 2018.
- 31 “Documenting the Quality of Journals for Publication in International Accounting,” Panelist, AAA Annual Meeting, San Diego, CA, August 2017.
- 30 “Graduate Tax Program Curriculum – International Taxation,” ATA Teaching and Curriculum Conference, Phoenix, AZ, February 2017.
- 29 DRAW3 – Third Design Science Research Workshop in Accounting, Opening Remarks, AAA Pre-Conference Workshop, AIS/SET Mid-Year Meeting, Charleston, SC, January 2015.
- 28 “Lehre und Forschung in Steuerlehre in den USA,” (Teaching and Research in Taxation in the U.S.), Annual VHB Steuerlehre Konferenz, Hanover, Germany, March 2014.
- 27 “Tax Patents,” American Taxation Association, Mid-Year Meeting, San Antonio, TX, February 2014.
- 26 DRAW2 – Second Design Science Research Workshop in Accounting, Opening Remarks, AAA, Pre-Conference Workshop, AIS/SET Mid-Year Meeting, Raleigh, NC, January 2014.
- 25 “Future Factory Academic Accounting Research Publications: An Exploratory Study of Evidence from Patented Inventions,” Babson College, Wellesley, MA, and University of Rhode Island, Kingston, RI, October 2013.
- 24
- 23 “Mentors & Protégés (Mentees): The most valuable Professional Relationships in a Developmental Network,” McNair Scholarship Program at Suffolk University, Boston, MA, April 2013.
- 22 DRAW1 – First Design Science Research Workshop in Accounting, Opening Remarks, AAA Pre-Conference Workshop, AIS/SET Mid-Year Meeting, Ft. Lauderdale, January 2013.
- 21 “International Tax and Transfer Pricing in Practice,” International Business Club, Suffolk University, Boston, MA, November 2012.
- 20 “Strategies for Negotiating & Fostering Effective Mentor/Mentee Relationships– A Conversation with a McNair Mentor,” McNair Summer Program Retreat at Boston College, Chestnut Hill, MA, June 2012.
- 19 “Students with Sensory Disabilities in the Classroom,” Panelist, Sensory Disability Institute at Suffolk University, May 2012.
- 18 “A Spoonful of Technology (Sugar) Makes the Tax-Learning (Medicine) Go Down,” Second Suffolk University Technology Symposium, Boston, May 2012.

- 17 ["U.S. Taxation, An Introduction,"](#) Visiting Group from the International Management Center Krems, Austria, Suffolk University, Boston, MA, April 2012.
- 16 ["McNair Program – Issues Impacting First Generation Students,"](#) Boston College, Chestnut Hill, MA, June 2011.
- 15 ["Let it Flow: Using Podcasts in the First Tax Course,"](#) First Suffolk University Technology Symposium, Boston, May 2011.
- 14 ["U.S. Education System, U.S. Workplace, Living and Working in Boston,"](#) Visiting Group from the International Management Center Krems, Austria, at Suffolk University, Boston, MA, April 2011.
- 13 ["A Study of the Use of Forensic Accounting Experts in Tax Litigation,"](#) Accounting Department Seminar, Suffolk University, February 2011.
- 12 ["U.S. Education System, U.S. Workplace, Living and Working in Boston,"](#) Visiting Group from the International Management Center Krems, Austria, Kaplan College, Boston, MA, April 2010.
- 11 ["Unintended Consequences of the U.S. Income Tax System: The Case of Student Inventors,"](#) ASciNA, Boston, MA, January 2010.
- 10 ["Teaching Diverse Students,"](#) New Faculty Orientation, Suffolk University, Boston, MA, September 2009.
- 9 ["Cultivating the Five Minds for the Future in a Tax Course,"](#) AAA, Annual Meeting, New York, NY, August 2009.
- 8 ["The Travels of a T-Shirt in the Global World of Taxation,"](#) American Taxation Association, Mid-Year Meeting, Orlando, FL, February 2009.
- 7 ["Cultivating the Five Minds for the Future in a Tax Course,"](#) AAA, Accounting Programs Leadership Group (APLG)/Federation of Schools of Accounting (FSA) Meeting, Nashville, TN, February 2009.
- 6 ["U.S. Tax Strategy Patents Dealing with Business Tax Issues: Applications for International Protection: Are they useful outside the U.S.?"](#) International Seminar Series: International Tax Coordination, Vienna University of Economics and Business Administration, Vienna, Austria, December 2008.
- 5 ["Untenured Faculty Panel – Making the First Year a Success,"](#) New Faculty Orientation Panelist, Suffolk University, Boston, MA, August 2008.
- 4 ["Incorporating Active Learning in Tax Classes: Discussion Board, Free-Writing Exercise,"](#) American Taxation Association (ATA), Mid-Year Meeting, Materials published on the ATA website, Memphis, TN, February 2008.
- 3 ["A Cognitive Model of Tax Problem Solving,"](#) Accounting Department Seminar, Suffolk University, Boston, MA, February 2007.

- 2 “[International Tax Coordination and CFC Legislation in the U.S.](#),” International Seminar Series: International Tax Coordination, WU, Vienna, Austria, March 2005.
- 1 “[Ethics in the Graduate Financial Planning and Taxation Curricula](#),” Global Gadfly Workshop in Business Ethics, Waltham, MA, May 2004.

*Talks to Practice-Oriented Groups*

- 37 “[Vision 2040: The Future of AI-Human Partnership](#)”, IFA Tax & Tech Seminar 3.0, Tax Executives Institute & International Fiscal Association Canada, Montreal, Canada, August 2026.
- 36 “[Investments for Impact](#)” (Panel Chair), 20<sup>th</sup> Annual Babson Sustainability & Energy Conference, Wellesley, MA, April 2026.
- 35 “[Women Leading in Tech, Finance and AI](#)” (Panel Chair), Babson Women Connect Summit, Wellesley, MA, March 2026.
- 34 “[The Babson Way](#)” (Panel Chair), 4<sup>th</sup> Annual Entrepreneurship Through Acquisition (ETA) Conference, Boston, MA, February 2026.
- 33 “[Women Entrepreneurship Research](#)” (Panel Chair), MENAGEN X DIRI Symposium, Miami, FL, December 2025.
- 32 “[It’s Not You, It’s Me](#)”, IFA Tax & Tech Seminar 2.0, Tax Executives Institute & International Fiscal Association Canada, Montreal, Canada, August 2025.
- 31 “[Emerging Tech in International Tax](#)”, with Jason Jones, International Fiscal Association USA New England Region, Boston, MA, July 2024.
- 30 “[Ethics-ESG: Global Tax Policy Statements](#)”, Chair, International Fiscal Association USA Annual Conference, Chicago, IL, April 2023.
- 29 “[Educational Training Challenges and Opportunities in Credit & Collections](#)”, Radiance UnConference, Atlanta, GA, February 2023.
- 28 “[Group approach and separate entity approach in domestic and international tax law incl. the new book-based corporate minimum tax](#)”, 74<sup>th</sup> World Congress of the International Fiscal Association, Berlin, Germany, September 2022.
- 27 “[Handling The Great Resignation: Scaling Staff Training And Career Growth](#)”, Radiance UnConference, Nashville, TN, April 2022.
- 26 “[Technology Panel](#)”, Chair, International Fiscal Association USA Annual Conference, Boston, MA, February 2020.
- 25 “[Impact of Robotics and Artificial Intelligence on International Tax Professionals](#),” International Fiscal Association, New England Regional Meeting, Boston, MA, May 2018.

- 24 ["ESG Reporting in the Babson Curriculum,"](#) State Street Environmental Sustainability Employee Network Speaker Series, Boston, MA, May 2018.
- 23 ["Replaced by Robots? Emerging Technologies in Tax Practice,"](#) International Fiscal Association USA Annual Conference, Houston, TX, February 2018.
- 22 ["Year-End Tax Planning" – Case Update,](#) 2012 New England Institute on Federal & State Taxation, Burlington, Westborough and Plymouth, MA, November 2012.
- 21 ["Cross-Border Charitable and Other Pro-Bono Contributions,"](#) Panelist, 66<sup>th</sup> Congress of the International Fiscal Association, Boston, MA, October 2012.
- 20 ["Year-End Tax Planning" – Case Update,](#) Combined IRS/Practitioner Institute on Federal Taxation, Burlington, Westborough and Plymouth, MA, November 2011.
- 19 ["Year-End Tax Planning" – Case Update,](#) Combined IRS/Practitioner Institute on Federal Taxation, Burlington, Westborough and Plymouth, MA, November 2010.
- 18 ["Year-End Tax Planning" – Case Update,](#) Combined IRS/Practitioner Institute on Federal Taxation, Burlington, Westborough and Plymouth, MA, November 2009.
- 17 ["Year-End Tax Planning" – Case Update,](#) Combined IRS/Practitioner Institute on Federal Taxation, Burlington, Westborough and Plymouth, MA, November 2008.
- 16 ["Ethics,"](#) 43rd Annual Combined Institute on Federal and State Taxation, Burlington, Worcester and Plymouth, MA, November 2006.
- 15 ["Ethics and Professional Responsibility,"](#) IRS Town Meeting at Bentley College, Waltham, MA, October 2006.
- 14 ["Successful Tax Practice: Year-End Tax Planning,"](#) 42nd Annual Combined Institute on Federal and State Taxation, Burlington, Worcester and Plymouth, MA, November 2005.
- 13 ["Revised Circular 230 – Ethical Responsibilities for Tax Professionals,"](#) Panel Chair, Twelfth IRS Town Meeting, Waltham, MA, October 2005.
- 12 ["How to Be a Successful Mentor,"](#) with Sridhar Ramamoorti, International Conference of the Institute of Internal Auditors, Chicago, IL, July 2005.
- 11 ["Bentley College: Success of the Extended Classroom,"](#) with Dominique Haughton and Ruth Horwitz, Centra Summit, Boston, MA, May 2005.
- 10 ["e-Services For the Modern Tax Practitioner,"](#) Eleventh IRS Town Meeting, Waltham, MA, October 2004.
- 9 ["Using the Experts,"](#) 10<sup>th</sup> IRS Town Meeting, Waltham, MA, October 2004.
- 8 ["Successful Tax Practice: Year-End Tax Planning,"](#) Annual Combined Institutes on Federal and State Taxation, Burlington, Worcester and Plymouth, MA, November 2004.

- 7 ["The President's Tax Program: Individual Tax Provisions,"](#) Annual Combined Institutes on Federal and State Taxation, Burlington, Worcester and Plymouth, MA, November 2003.
- 6 ["Successful Tax Practice: Year-End Tax Planning,"](#) Annual Combined Institutes on Federal and State Taxation, Burlington, Worcester and Plymouth, MA, November 2002.
- 5 ["The President's Tax Program: Economic Growth and Tax Relief Act of 2001, Individual Tax Provisions,"](#) Annual Combined Institutes on Federal and State Taxation, Burlington, Worcester and Plymouth, MA, November 2001.
- 4 ["Pricing Products and Services in Euroland,"](#) Mass Export Center, Boston, MA, April 1999.
- 3 ["Intercompany Transfer Pricing, Focus: Germany,"](#) National Transfer Pricing Conference, Coopers & Lybrand L.L.P., Santa Monica, CA, March 1998.
- 2 ["Intercompany Transfer Pricing, Focus: USA & Germany,"](#) German-American Practice Leaders Meeting, Coopers & Lybrand L.L.P., New York, NY, November 1997 and
- 1 German-American Council for Business, with Director of Economic Consulting Group Boston, MA, October 1997.

#### *Podcasts*

- 1 ["Do Well by Doing Good: The 'Stuff' in Sustainability"](#), From Problems to Possibilities Podcast Series, May 2025.

#### *Leadership Retreat*

- 1 ["The future of the accounting profession, addressing pain points, and news in emerging technologies"](#), Perelson Weiner LLP, Westchester, NY, January 2023.

#### *Training Program for Non-Degree Seeking Audience*

- 1 ["International Taxation,"](#) Massachusetts Society of CPAs, Babson Executive Education Center, Wellesley, MA, October 2015.

#### *Talk to International Social Group*

- 1 ["Young Schumpeter's Ghost,"](#) Austro-American Association of Greater Boston, Sudbury, MA, October 2013.

#### **MEDIA COVERAGE**

["Prepare your students for ESG careers,"](#) Journal of Accountancy, November 9, 2022.

["As the Need for Data Skills Grows, Accounting Professors Try to Keep Pace,"](#) Chronicle of Higher Education, July 2022.

[“Motivate students to do the assigned reading,”](#) by Samiha Khanna, AICPA, Extra Credit, June 2020 .

[“Revisiting a Global Business Class,”](#) by Sara Parker, Babson Thought & Action, May 2020.

[“2020 MBAs to Watch,”](#) Poets & Quants, May 2020.

[“2018 Best MBAs,”](#) named favorite professor by Ravish Majithia, Poets & Quants, May 2018.

[“Land of Opportunity. Living and Working in Boston,”](#) by Stephanie Marberger, WU Karrieremagazin (Career Magazine of the Vienna University of Economics and Business), Dec 2014, 29-30.

[“Charitable Giving Goes Global,”](#) news analysis by Robert Goulder in Tax Notes International, Oct 15, 2012.

[“Steuerflüchtlinge werden geächtet” \(Tax fugitives are ostracized\),](#) interview related to the title story on wealthy individuals, Focus Magazin (comparable to NewsWeek in the U.S.), p. 108, Nov 2008.

[“Jenseits der Grenzen: Die USA als “neue Heimat”” \(Beyond the borders: The U.S. as the “New Home”\),](#) Akademie der Wirtschaftstreuhänder Österreich, Newsletter, 2/2008.

[“A Big Tax Bite” \(Transfer Pricing\)](#) by Alan Gersten, Journal of Commerce, Jan 21, 1998.

## UNDERGRADUATE STUDENT PAPER SUPERVISION

### *Honors Theses*

Grant Gelles, [“Healing Healthcare: A Wholistic Approach to Aligning the Interests of Providers and Patients,”](#) supervisor, 2022.

Yun-Wen Chen, [“Dissecting Material ESG Factors: Alpha Signals for Equities and Corporate Bonds,”](#) supervisor, 2020.

Rupam Gupta, [“Trends in Knowledge Spillover Between Artificial Intelligence and Various Business Disciplines,”](#) co-supervision with Davit Khachatryan, 2016.

## GRADUATE STUDENT PAPER SUPERVISION

### *Refereed Journals*

Cory Vargo, [“Lessons from an Independent Look at Carried Interest Taxation and Private \(and Horizontal\) Equity,”](#) Tax Notes, Volume 137, pp. 425-432, Oct. 22, 2012.

- Cited in: Congressional Research Service Report “Taxation of Hedge Fund and Private Equity Managers,” RS22689, June 20, 2013.

Bethany Record, [“Lessons Learned From the Enhanced Oil Recovery Credit,”](#) Tax Notes, Volume 125, pp. 1107-1110, Dec. 7, 2009.

Katja Pauwels, "The Benefits of Tax Treaties and Foreign Tax Credits in Sub-Saharan Africa," Tax Notes International, Volume 51, pp. 447-458, Aug. 4, 2008.

#### *Master Theses*

Ion Frecautan, "Differences Between Financial Reporting and Income Tax Regulations in the Eastern Europe and Central Asia Regions: A Comparative Analysis and Evaluation of the Potential Effects on Financial Statements and the Cost of Compliance," a collaboration with the World Bank, 2011.

Karina Sarkisian & Natalija Mihajlovic, "Building an Effective Value Creation Oriented Controlling System" – Siemens Serbia, 2011.

Balazs Staudinger, "Analysis of IFRS and U.S. GAAP Convergence Program on the Proposed Lease Accounting Standard," 2011.

Stefan Hagmair, "Betriebsstätte v. Tochterkapitalgesellschaft – ein Vergleich aus rechtlicher und betriebswirtschaftlicher Sicht am Beispiel einer österreichischen Produktionsstätte einer deutschen Aktiengesellschaft" (Branch v. Subsidiary – a legal and economic comparison of branch vs. subsidiary structure for an Austrian manufacturing plant of a German corporation – BMW Motors), 2007.

#### *Directed Graduate Studies*

Carlos Durand, "Mobile Digital Advertising Feasibility and Business Plan", 2025.

Gita Pattigana, "Developing a Digital Roaming Business", 2025.

Hiro Tamai, "Developing a Turnaround Strategy", 2025.

Asri Wijayanti, "Fraud at eFishery", 2025.

Chris Bourne, "Taxation in the Clouds," 2013.

Tucker Matheson, "Transfer Pricing Aspects of Intangibles: A Global Concern," 2011.

Kelly McDonnell, "International Capital Gains Taxes," Global MBA CapstoneProject, 2011.

#### *Tax Policy Capstone Papers*

150 completed papers on individual students' tax policy topics of choice.

SERVICE – PROFESSIONAL

## EDITOR

|                                                       |              |
|-------------------------------------------------------|--------------|
| Journal of Emerging Technologies in Accounting (JETA) | 2023-present |
|-------------------------------------------------------|--------------|

## EDITORIAL BOARD

|                                                       |                           |
|-------------------------------------------------------|---------------------------|
| Journal of Accounting Education (JAE)                 | 2018-present              |
| Journal of Emerging Technologies in Accounting (JETA) | 2015-2020                 |
| ATA Journal of Legal Tax Research (JLTR)              | 2018-present +<br>2012-14 |

## EDITORIAL ADVISORY AND REVIEW BOARD

|                                                       |           |
|-------------------------------------------------------|-----------|
| Journal of Emerging Technologies in Accounting (JETA) | 2020-2023 |
|-------------------------------------------------------|-----------|

## AD-HOC JOURNAL REVIEWER

|                                                                           |            |
|---------------------------------------------------------------------------|------------|
| Accounting Horizons                                                       | Since 2023 |
| Intelligent Systems in Accounting, Finance and Management (ISAFM)         | Since 2019 |
| Accounting Education: An International Journal (AE)                       | Since 2018 |
| Journal of Emerging Technologies in Accounting (JETA)                     | Since 2014 |
| Journal of Forensic and Investigative Accounting (JFIA)                   | Since 2014 |
| Journal of International Accounting, Auditing and Taxation (JIAAT)        | Since 2013 |
| Journal of International Accounting Research (JIAR)                       | Since 2013 |
| Accounting Historians Journal (AHJ)                                       | Since 2013 |
| Journal of Information Systems (JIS)                                      | Since 2012 |
| Journal of Electronic Commerce (JECR)                                     | Since 2012 |
| International Journal of Accounting Information Systems (IJAIS)           | Since 2011 |
| Journal of Accounting Education (JAE)                                     | Since 2011 |
| Issues in Accounting Education (IAE)                                      | Since 2010 |
| CPA Journal (CPAJ)                                                        | Since 2009 |
| Int'l Journal of Accounting, Auditing and Performance Evaluation (IJAAPE) | Since 2008 |

*AMERICAN ACCOUNTING ASSOCIATION (AAA)*

|                                                       |                        |
|-------------------------------------------------------|------------------------|
| Nominations Committee                                 | 2022-23                |
| Council, Member                                       | 2018-21                |
| Council Ballot Committee, Chair                       | 2019-20                |
| Council Committee on Awards Committee, Vice-Chair     | 2019-20                |
| Council Committee on Awards Committee, Member         | 2018-19                |
| Distinguished and Notable Literature Awards Committee | 2019-20, 12-14         |
| Innovation in Accounting Education Award Committee    | 2018-19                |
| Cook Prize Nominator                                  | 2024, 22,<br>21, 17-19 |
| Doctoral Consortium Committee                         | 2013-14                |
| Pathways Commission, Subcommittee, AACSB A7, Member   | 2013-14                |

*Strategic Emerging Technologies Section (SET)*

|                                                                                               |                |
|-----------------------------------------------------------------------------------------------|----------------|
| Nominations Committee, Member                                                                 | 2023-24, 26-27 |
| Transformative Technologies Workshop, Advisory Board Member                                   | 2019-24        |
| Strategic Planning Committee, Member                                                          | 2019-20        |
| Transformative Technologies Workshop, Co-Chair                                                | 2016-19        |
| Continuing Education/CPE Committee, Chair                                                     | 2017-19, 15-16 |
| Website Committee, Member                                                                     | 2015-16        |
| Executive Committee, Past-President                                                           | 2014-15        |
| Nominations Committee, Chair                                                                  | 2014-15        |
| President                                                                                     | 2013-14        |
| Creator and organizer of the Design Science Research Workshops in Accounting (DRAWI, 2 and 3) | 2012-15        |
| Co-organizer of the SET Research Workshop in Accounting, Auditing and Tax                     | 2012-13        |
| Secretary, Treasurer, Vice President Academic, President Elect                                | 2010-13        |
| Conference paper reviewer                                                                     | 2009-present   |

*American Taxation Association (ATA)*

|                                                             |                          |
|-------------------------------------------------------------|--------------------------|
| Publications Committee                                      | 2026-27, 12-14           |
| Mid-Year Meeting Committee                                  | 2024-26, 16-<br>18+13-14 |
| Legal Research Committee                                    | 2019-25                  |
| Long-Range Planning Committee, Chair                        | 2022-23+17-18            |
| Long-Range Planning Committee                               | 2015-17                  |
| Treasurer                                                   | 2014-15                  |
| Membership Committee, Chair                                 | 2012-14                  |
| Trustee                                                     | 2011-13                  |
| Teaching Resources Committee, Chair and Past Chair Member   | 2010, 2003               |
| ATA/Deloitte Teaching Innovation Award Committee            | 2009                     |
| Regional Meetings, Chair                                    | 2006-08                  |
| Northeast Regional Coordination Committee, Member and Chair | 2002-04                  |
| International Tax Policy Committee                          | 2003-present             |
| Conference paper reviewer                                   |                          |

*International Accounting Section (IAS)*

|                                        |              |
|----------------------------------------|--------------|
| Annual Meeting, Co-coordinator         | 2020-21      |
| IAS Educator of the Year               | 2019-20      |
| Awards Committee, Member               | 2015-16      |
| Northeast Regional Meeting Coordinator | 2013         |
| Conference paper reviewer              | 2003-present |

*Diversity Section*

|                                        |         |
|----------------------------------------|---------|
| Northeast Regional Meeting Coordinator | 2012-21 |
|----------------------------------------|---------|

*Forensic Accounting Section (FAS)*

|                                                   |              |
|---------------------------------------------------|--------------|
| Nominations Committee                             | 2013-14      |
| Tax Fraud/Underground Economy Committee, Member   | 2010-17      |
| Bylaw Review/Strategic Planning Committee, Member | 2010-11      |
| Conference paper reviewer                         | 2010-present |

*Accounting and the Public Interest*

|                                             |      |
|---------------------------------------------|------|
| Ethics Symposium, tax policy paper reviewer | 2012 |
| Conference paper reviewer                   | 2012 |

*Northeast Region*

|                           |              |
|---------------------------|--------------|
| Conference paper reviewer | 2000-present |
|---------------------------|--------------|

*INTERNATIONAL FISCAL ASSOCIATION (IFA)*

|                                                                  |              |
|------------------------------------------------------------------|--------------|
| USA Branch Technology Committee, inaugural VP Technology         | 2022-24      |
| USA Branch Technology Committee, Co-Chair                        | 2020-22      |
| USA Branch Vice President, Secretary                             | 2018-20      |
| USA Branch Tax Technology Committee, Member                      | 2017-18      |
| USA Branch Executive Council, Member, Academia Liaison           | 2016-18      |
| USA Branch Strategic Planning Committee, Member                  | 2012-13      |
| New England Steering Committee, Member                           | 2007-present |
| USA Branch Education/Academia Committee (Founding Chair 2006-13) | 2006-16      |
| USA Branch Writing Prize Committee (Chair 2006-13)               | 2006-18      |
| USA Branch Council, Member                                       | 2006-present |

*Conferences*

|                                                                                                 |                  |
|-------------------------------------------------------------------------------------------------|------------------|
| Annual Conference of the USA Branch and U.S.-Canada Joint Meeting 2020                          | 2017-20          |
| 66 <sup>th</sup> World Congress, Organizing Committee, Member                                   | 2007-12          |
| IFA USA International Tax Research Symposium, Creator and Chair                                 |                  |
| Academia Luncheon, Creator and Co-Chair                                                         |                  |
| Creator and organizer of the first IFA USA International Tax Colloquium, Atlanta, February 2011 | 2010-11          |
| Co-organizer of New England Mini Spring Conference, held at Babson College                      | 2018, 2015       |
| Co-organizer of New England Mini Spring Conferences, held at Suffolk University                 | 2013, 2011, 2009 |
| Co-organizer of the 2004 Joint Meeting for the U.S. and French Branches in Salzburg, Austria    | 2002-04          |

|                                                                                                                                     |              |
|-------------------------------------------------------------------------------------------------------------------------------------|--------------|
| ASSOCIATION FOR INFORMATION SYSTEMS (AIS)<br>Special Interest Group for Accounting Information Systems<br>Conference paper reviewer | 2015-present |
| AMERICAN INSTITUTE OF CERTIFIED PROFESSIONAL ACCOUNTANTS<br>(AICPA) Global Academic Champion                                        | 2020-present |
| MASSACHUSETTS SOCIETY OF CPAS (MSCPA)<br>Board of Directors, Member                                                                 | 2013-15      |
| Board Audit Committee                                                                                                               | 2013-15      |
| Academic and Career Development Committee (ACDC)                                                                                    | 2009-23      |
| Federal Tax Committee                                                                                                               | 2014-23      |
| Accounting & Auditing Committee                                                                                                     | 2014-present |
| HIGHAKO ACADEMY<br>Advisory Council                                                                                                 | 2022-2024    |
| TABLEAU, a Salesforce Company<br>Instructor Advisory Council, Member                                                                | 2022-24      |
| THOMSON REUTERS, International Tax<br>Advisory Board, Member                                                                        | 2012-18      |
| VIENNA UNIVERSITY OF ECONOMICS AND BUSINESS (WU)<br>Alumni Association, Hub Founder and Chair                                       | 2011-16      |
| FISHER COLLEGE, Boston<br>Trustee, Academic Affairs Committee and Finance Committee, Member                                         | 2005-07      |
| GERMAN-AMERICAN COUNCIL FOR BUSINESS (GACB)<br>Board of Directors, Member                                                           | 1997-99      |
| PWC, Diversity Council<br>Founding Council Leader, appointed by Boston Office Managing Partner                                      | 1998-99      |
| <u>SERVICE - PUBLIC COMPANY</u>                                                                                                     |              |
| CREDITRISKMONITOR (CRMZ), New York<br>Board of Directors, Member                                                                    | 2023-25      |
| Audit Committee, Chair                                                                                                              | 2023-25      |

## SERVICE – COLLEGE/UNIVERSITY

### **BABSON COLLEGE**

2014-present

#### *College-Wide*

Babson Global, Inc., Board Member (2020-present)  
 Strategic Planning, Student Experience Task Force Advisory Member (2019)  
 Development Office (2018-present)  
 Graduate Admissions (2018-present)  
 Center for Engaged Learning and Teaching (CELT), Steering Committee, Member (2016-17)  
 Babson Insights Editorial Advisory Committee, Member (2015-17)  
 Teaching Innovation Fund (TIF), Member (2015-16)  
 Provost Search Committee, Member (2015-16)  
 Faculty Worklife and Compensation Committee (FWCC), Member (2014-16)  
 Centennial Committee, Member (2015-17)  
 Faculty Learn and Share Committee, Member (2014-15)  
 Graduate student career and start-up advising (2014-present)  
 Assist students & scholars from/to German-speaking countries (2014-present)

#### *F.W. Olin Graduate School of Business*

VC/PE Club, Advisor (2024-present)  
 Entrepreneurship Through Acquisition Club, Advisor (2023-present)  
 Energy and Sustainability Club, Advisor (2023-present)

#### *BOW – Three College Collaboration*

BOW Stammtisch for Faculty & Staff, Founder and Co-Organizer (2016-19)

#### *Accounting & Law Division*

Leader, Scholarship and Publications (2018-19)  
 Chair, Division of Accounting & Law (2016-18)

### **SUFFOLK UNIVERSITY**

2007-14

#### *University-wide*

McNair Scholarship Program, advisory board member (2010-14)  
 Search Committee for Director of the Center for Academic Access & Opportunity (CAAO), faculty representative (2013-14)  
 Knowledge Globalization Institute, member of the Conference Committee and helping to connect with the global community (2012)

Center for Teaching Excellence, new faculty orientation (2008-10)

*McNair Scholarship Program*

Mentor (2009-2014)

*Sawyer Business School*

Undergraduate Honors Theses supervision

International faculty and student exchange with Vienna University of Economics and Business

Speaker and external speaker recruiting for the International Business Club

*Accounting Department*

Graduate and undergraduate student advising and counseling

Post-course supervision of students during manuscript preparation of capstone course tax policy papers for submission to refereed journals

International Fiscal Association (IFA), New England Region, academic outreach extended breakfast meetings @ 73 Tremont Street (2009, 2011, 2013)

Association of Latino Professionals in Finance and Accounting (ALPFA), inaugural faculty adviser (2009-10)

Guest speaker in the international accounting course for international taxation and transfer pricing (2008-10)

## **BENTLEY UNIVERSITY**

*Institution-wide*

2000-07

Faculty Senator, Honors Program Adviser, Bentley Business Bowl Judge

Davis Fellow, Women's Leadership Institute Founding Member

Cronin International Center Fellow, CyberLaw Center Fellow

International Faculty and Student Exchange, cooperation partner for Austria

*Department of Financial Planning and Taxation*

2000-05

Leader of the multi-year MSFP and MST curriculum innovation

Developer of the first departmental website

Leader or member of departmental task forces

Graduate student adviser and counselor

## **PERSONAL INTERESTS**

Design, travel, natural healing, visual arts, classical music, libraries

Skiing, Nordic walking, dancing, yoga, classical stretch