

EDUCATION

- 1998 Juris Doctorate
 George Washington University Law School
- 1992 Bachelor of Business Administration - Accounting (*cum laude*)
 Howard University

ACTIVE LICENSE/CERTIFICATION

Attorney/Bar. MD, DC. License # 474857
Certified Public Accountant. MD. License # 22290

TEACHING

- 2012 – present Associate Professor of Accounting and Business Law
 Howard University School of Business
- 2004 – 2012 Assistant Professor of Accounting and Business Law
 Howard University School of Business
- 2008 – 2010 Adjunct Instructor
 Bowie State University
- 2006 – 2007 Adjunct Instructor
 University of Maryland University College
- 2002 – 2004 Adjunct Instructor
 Howard University
- 2001 – 2004 Adjunct Instructor
 Prince Georges Community College
- 2008 – 2010 Becker CPA Instructor

COURSES TAUGHT

Undergraduate

Accounting Principles I
Accounting Principles II
Business Law I
Fundamentals of Accounting
Tax Principles and Procedures
Forensic Accounting

Graduate

Entity Tax
Federal Income Taxation (online)
Management Accounting
Legal Environment
Tax Management

ACADEMIC ADMINISTRATIVE POSITIONS

- 2018 – 2019 Chair – Department of Accounting, Howard University School of Business
- 2012 – 2013 Chair – Department of Accounting, Howard University School of Business
Prepared report to AACSB-International for Maintenance of Accreditation

PROFESSOR IN RESIDENCE

- 2007 KPMG Washington National Tax Legislative and Regulatory Services Group
6 month residency.

PUBLICATIONS

Refereed Publications

- Carter, L., McFadden-Wade, G & Wells, J. T. (2016). *Exploring the Impact of Organizational Citizenship Behavior on Perceptions of E-Filing Success*. **International Journal of Public Administration in the Digital Age**. 3. 43-52.
- Fleming, M., McFadden, G. & Wells, J. (2015). *Medical Marijuana: A Tale of Competing Statutes*. **Southeast Case Research Association Journal**
- Lucy L., Clarke, A., Ross, F. & Wells, J. (2015). *Mentoring Experience, Perceived Benefits, and Impact on Current Job Position in African-American Accountants*. **Advancing Women in Leadership Journal**. Vol. 35, pp. 193-203.
- Ross, F., Wells, J. & Clarke, A. (2014). *A Pipeline for Diversity: Initiative Spearheads Profession Wide Effort to Attract Underrepresented Minorities to Accounting*. **Journal of Accountancy**. 218(2)
- Wells, J. & Ross, F. (2012). *Best Practices for Promotion of Diversity in the Accounting Profession*. **Journal of Accountancy**. 213(6)
- Wells, J. & McFadden, G. (2011). *Tax-Exempt Hospitals and New Reporting Requirements. CPAs Can Help Clients Complete Community Health Needs Assessment*. **Journal of Accountancy**. 212(5)
- Stewart, L., Wells, J & Ross, F. (2011). *Promotion and Retention of African American Accountants in the 21st Century Public Accounting Profession: A Summary of Findings and a Call for Action*. **Journal of Diversity Management**. 6(4)
- Fleming, M. & Wells, J. (2010). *Ethical, Evidentiary, and Constitutional Concerns of Utilizing Social Networking Web Sites in Civil and Criminal Cases: The Good, The Bad, and The Ugly*. **Southern Law Journal**. Vol. 20
- Wells, J & McFadden, G. (2010). *A Property Tax Scam: Washington D.C. \$48 Million Embezzlement*. **Journal of Business Case Studies** 6(3)

Wells, J. & McFadden, G. (2010). *Sex Change Surgery Deductible Medical Expense*. **Journal of Accountancy**. 209(5)

Wells, J (2009). *Related Parties Must Share Employee Stock Options Costs*. **Journal of Accountancy**. 208(4)

Wells, J (2009). *Third Party's Activities Creates Nexus*. **Journal of Accountancy**. 207(5)

Wells, J (2009). *P&G Appeals Deduction Denial*. **Journal of Accountancy**. Vol. 207(4)

Wells, J (2008). *Royalties from Related Party are Income*. **Journal of Accountancy**. 206(6)

Gabbin, A & Wells, J. (2008). *Tax Workpapers and Work Product Privilege: Textron and the Auditor/Attorney Relationship*. **CPA Journal**. 78(4)

Wells, J. & McFadden, G. (2007). *Tax Court to Rule on Sex Change*. **Journal of Accountancy**

Wells, J. & McFadden, G. (2007). *Nexus and FIN 48: States of Flux*. **Journal of Accountancy**

Glover, H & Wells, J. (2007). *Auditor Selection: Why Did A Small Company Select A Big Four Accounting Firm? Did The Company Make The Right Decision? A Case Study for Auditing Courses*. **Business Journal for Entrepreneurs**. 2007(3)

McFadden, G. & Wells, J. (2007). *Regulation of Charitable Organizations Operating Post September 11, 2001: Treasury v. Charitable Sector*. **International Business and Economics Research Journal**. 6(8)

Glover, H., McMillan, J. & Wells, J. (2006). *Making the Decision to Outsource a Service Department: Who Should Deliver Internal Audit Services?* **Journal of Business and Leadership: Research, Practice and Teaching**. 2(1)

Schliefer, L., Glover, H., Durcharme, S. & Wells, J. (2006). *Identifying Fraudulent Lending Practices in the U.S.: Who Should Protect the Public Trust?* **Ethics & Critical Thinking Quarterly Journal**. 2006(4)

Book Chapters

Winstead, W. & Wells, J. (under review). *African Youth Rising: The Emergence and Growth of Youth-led Digital Enterprises in Africa*. **Palgrave Handbook of African Entrepreneurship**

Carter, L., McFadden-Wade, G., & Wells, J. T. (2019). *Exploring the Impact of Organizational Citizenship Behavior on Perceptions of E-Filing Success*. **Human Performance Technology: Concepts, Methodologies, Tools, and Applications**. Edited by Information Resources Management Association, IGI Global, pp. 1792-1802.

Wells, J. (2011). *Introduction to S Corporations*. **Tax Practice Series, Bureau of National Affairs**, Para. 4210

Wells, J. (2011). *Taxation of S Corporations*. **Tax Practice Series, Bureau of National Affairs**, Para. 4260

Wells, J. (2008). *Holding Period*. **Tax Practice Series, Bureau of National Affairs**, Para. 1640.

Wells, J. (2008). *Sale or Exchange Requirement*. **Tax Practice Series, Bureau of National Affairs**, Para. 1630

Other Publications

Wells, J. & McFadden, G. (2020). *Generation Z and the Accounting Profession*. **Spectrum**. Winter 2020

Ross, F., Clarke, A. & Wells, J. (2014). *Filling the Accounting Profession's Talent Pipeline*. **Spectrum**. Winter 2014

Wells, J. & McFadden, G. (2010). *Path to Financial Independence Program Evaluation Report Annual Report*. **Path to Financial Independence**

Ross, F. & Traub, L. (2009). *Retaining African Americans in the Accounting Profession: A Success Model*. **Center for Accounting Education**. Contributor

Wells, J. & McFadden, G. (2008). *Volunteer Income Tax Assistance: A Closer Look at HBCU Participation*. **Path to Financial Independence**

Wood, L. & Wells, J. (2007). NABA Members and Their Work Experiences. **Spectrum**. Summer 2007

KPMG. (2007). *KPMG Comparison of House-Passed Renewable Energy and Conservation Tax Act and Senate Finance Committee-Approved Energy Advancement and Investment Act*. **Bureau of National Affairs Daily Tax Report**. Contributor

Gutman, H., Bocchino, G. & Wells, J. (2007). *New Heightened Standards for Tax Return Preparers*. **KPMG Tax Governance Institute Insights**

Glover, H.D. and Wells, J. (2007). *Technology and the Loss of Internal Controls*. **Internal Auditing**, 22(1)

Ross F. & Wells, J. (2006). *NABA Membership Survey: Analysis of Work Experiences of NABA Members*. **Center for Accounting Education**. Quoted in **US Department of the Treasury Advisory Committee on the Auditing Profession (2008)**

Ross F., Annisette, M. & Wells, J. (2006). *The Professional Experiences of African-American Accountants: Analysis of Survey Results*. **Center for Accounting Education**. Quoted in **US Department of the Treasury Advisory Committee on the Auditing Profession (2008)**

Refereed Proceedings

Fleming, M., McFadden, G. & Wells, J. (2010). *Holding Your Pee for a Nintendo Wii*. **Proceedings of the Southeast Case Research Association Seventeenth Annual Meeting**

McFadden, G. & Wells, J. (2009). *A Property Tax Scandal: Who Should Have Caught It?* **Proceedings of the Southeast Case Research Association Seventeenth Annual Meeting**

Wells, J. & McFadden, G. (2009). *Both Hands in the Cookie Jar: Washington D.C.'s \$48 Million Loss*. **Proceedings of the Southeast Case Research Association Seventeenth Annual Meeting**

McFadden, G., Wells, J. & Robinson D. (2009). *Financial Reporting of Environmental Risks and Liabilities*. **Proceedings of the 2007 National Conference on Environmental Science and Technology**, Chapter 12, Springer

McFadden, G., & Wells, J. (2007). *Kamehameha Schools Admissions Policy: Preferential or Racially Discriminatory*. **Proceedings of 2007 Southern Academy of Legal Studies in Business Conference**

McFadden, G., & Wells, J. (2007). *Private School's Admissions Policy Validated by the 9th Circuit*. **Proceedings of the Academy of Legal, Ethical and Regulatory Issues**. 11(1)

Wells, J. & McFadden, G. (2007). *Physical Presence v. Economic Presence: FIN 48 Implications*. **Proceedings of the Academy of Legal, Ethical and Regulatory Issues** (11(1))

Book Reviews

Markets in Vice, Markets in Virtue John Braithwaite, **Journal of the American Taxation Association** 28(2)
Fall 2006

RESEARCH AWARDS

2016 Howard University Research Symposium
 Winner: Best presentation: Business Senior Faculty
 Title: Ineffective Internal Controls and Information Systems Lead to Largest Embezzlement in DC Government History

2013 Howard University Research Symposium
 Winner: Best presentation: Business Senior Faculty
 Title: Identity Theft Tax Refund Fraud: Efforts to Detect and Prevent

CONFERENCE PRESENTATIONS

Wells, J. & McFadden, G. (2019). *Impact of US Tax Policy on African Americans: A Historical Review*. **American Accounting Association Annual Diversity Conference**

Khan, O., Winstead, W. & Wells J. (2018). *In Search of African IB Paradigms: The Role of Intellectual Property and Entrepreneurship*. **Academy of International Business-Southeast Conference**

Wells, J. & McFadden, G. (2018). *Did Federal Income Tax Laws Promote Segregation in Education? A Historical Review: 1954-1983*. **Howard University Research Week**

Winstead, W. & Wells J. (2018). *African Youth Entrepreneurship: Youth dividend or ticking time bomb?* **Washington Business Research Forum**

Wells, J. & McFadden, G. (2017). *Citizenship-by-Investment Programs in the Eastern Caribbean: Economic Benefits and Rewards*. **Howard University Research Week**

Wells, J. & McFadden, G. (2016). *Ineffective Internal Controls and Information Systems Lead to Largest Embezzlement in DC Government History*. **Howard University Research Week**
Poster Presentation Senior Business Faculty - Winner

Wells, J. & McFadden, G. (2015). *Identity Theft Tax Refund Fraud: Efforts to Detect and Prevent*. **Howard University Research Week**
Poster Presentation Senior Business Faculty – Winner

- Wells, J., Ross, F., Clarke, A. & Gabre, H. (2015). *We're About Success! Leadership Skills Development Program: How External Efforts Increased the Retention of African Americans in the Accounting Profession*. **American Accounting Association Annual Diversity Conference**
- Lim, L., Ross, F., Wells, J. & Clarke, A. (2015). *Mentoring Experience, Perceived Benefits, and Impact on Current Job Position in African-American Accountants*. **American Accounting Association Annual Conference**
- Wells, J. (2013). *Accounting Pipeline Issue: Attracting High School and Community College Students*. **American Accounting Association Annual Diversity Conference**
- Carter, L., McFadden, G. & Wells, J. (2010). *Organizational Citizenship Behavior and IS Success*. **International Conference on Information Society**
- Wells, J. & McFadden, G. (2010). *Path to Financial Independence Program Evaluation Report Annual Report*. **Path to Financial Independence**
- Fleming, M. & Wells, J. (2010). *Utilizing Social Networking Sites in Criminal and Civil Cases: The Good, the Bad, and the Ugly*. **Southern Academy of Legal Studies in Business**
- Fleming, M., McFadden, G. & Wells, J. (2010). *Holding Your Pee for a Nintendo Wii*. **Southeast Case Research Association Seventeenth Annual Meeting**
- Carter, L., McFadden, G. & Wells, J. (2009). *The Impact of Change Management on Technology Adoption*. **Decision Sciences Institute 2009 Annual Meeting**
- Wells, J. & McFadden, G. (2009). *Retirement Savings Contribution Credit – History and Utilization*. **Southern Academy of Legal Studies in Business Conference**
- Wells, J. & McFadden, G. (2009). *A Property Tax Scandal: Who Should Have Caught It?* **Southeast Case Research Association Annual Meeting**
- McFadden, G. & Wells, J. (2009). *Both Hands in the Cookie Jar: Washington D.C.'s \$48 Million Loss*. **Southeast Case Research Association Annual Meeting**
- McFadden, G., Wells, J. & Highsmith-Quick, G. (2008). *Recruitment of Minority Students into the Accounting Profession: A Comparative Study of Two HBCUs*. **American Accounting Association Annual Diversity Conference**
- McFadden, G. & Wells, J. (2008). *Volunteer Income Tax Assistance: A Closer Look at HBCU Participation*. **American Accounting Association Annual Diversity Conference**
- Stewart, L., Ross, F. & Wells, J. (2008). *Promotion, Retention and Ethnic Diversity in The 21st Century US Public Accounting Profession*. **American Accounting Association Annual Diversity Conference**
- Wells, J. & McFadden-Wade, G. (2007). *Foreign Policy vs. Tax Policy: The Impact on Charitable Deductions*. **American Accounting Association Annual Diversity Conference**
- McFadden-Wade, G. & Wells, J. (2007). *Expanding the Envelope: Fundamental Public Policy and Education*. **American Accounting Association Annual Diversity Conference**

McFadden-Wade, G. & Wells, J. (2007). *Environmental Accounting Issues Post-Sox*. **National Conference on Environmental Science and Technology**

McFadden-Wade, G. & Wells, J. (2007). *Kamehameha Schools Admissions Policy: Preferential or Racially Discriminatory*. **Southern Academy of Legal Studies in Business**

Wells, J. & McFadden, G. (2006). *Tax Exemption and Racially Discriminatory Private Schools in the United States: 1945-1982*. **American Accounting Association Annual Diversity Conference**

Annisette, M., Ross, F., Wood, L. & Wells, J. (2006). *The Professional Experiences of African-American Accountants*. **American Accounting Association Annual Diversity Conference**

McFadden-Wade, G. & Wells, J. (2005). *Tax-Exempt Status of 501(c)(3) Organizations: Will Sexual Discrimination Rise to the Level of Racial Discrimination?* **American Accounting Association Annual Diversity Conference**

Glover, H., McMillan, J. & Wells, J. (2005). *Making the Decision to Outsource a Service Department*. **American Accounting Association Mid-Year Auditing Conference**

Glover, H., McMillan, J. & Wells, J. (2005). *Making the Decision to Outsource a Service Department*. **American Accounting Association Annual Conference Effective Learning Strategies Forum**

Glover, H., McMillan, J. & Wells, J. (2005). *Making the Decision to Outsource a Service Department*. **2005 American Accounting Association Annual Conference Research Forum**

Wells, J. (2005). *Competing Student Interests and the Business Law Curriculum*. **Academy of Legal Studies in Business Annual Conference**

PANEL PARTICIPATION

June 2018 HBCU National HBCU Business Deans Roundtable Summit
Panel: Our Roadmap to Strengthen and Diversify the Profession Starts with You
Moderated by the Center for Audit Quality

Aug. 2014 American Accounting Association Annual Conference
Panel: Attracting Underrepresented Minorities to the Accounting Profession: Insights to Diversifying the Talent Pipeline

Aug. 2013 American Accounting Association Annual Conference
Panel: AICPA National Commission on Diversity and Inclusion Panel

Aug. 2013 American Accounting Association Annual Conference
Panel: Teaching, Curriculum, and Recruitment Issues Related to International Students

MEDIA QUOTATIONS

May 6, 2020 *7 Tips for Investing Your Tax Refund.* **US News and World Report**

April 4, 2019 *Does Meghan Markle have to pay U.S. taxes this year?* by Mia Taylor, **Policygenius**

Mar. 21, 2019 *The one thing you should do after filing your taxes* by Mia Taylor, **Policygenius**

Oct. 2009 *All Star Advice: Financial Planners, Investment Gurus, Realtors, Tax Advisers, and Insurance Agents Share Their Best Advice-In Their Own Words* as told to Renita Burns and Marcia Wade Talbert, **Black Enterprise**, pg. 70,

Apr. 1, 2009 *The Cutting Edge: Tax Tips for Filers* by Renita Burns, **Blackenterprise.com**

Apr. 8, 2009 *The Cutting Edge: Big Tax Refund? You Might Want to Think Twice* by Renita Burns, **Blackenterprise.com**

MEDIA APPEARANCE

Feb. 17, 2016 *Criminals at Work Season 1*
Episode 8 *Catch Me If You Can*, **Black Entertainment Television**
Explained how the largest embezzlement occurred in Washington DC as detailed in
A Property Tax Scam: Washington D.C. \$48 Million Embezzlement. **Journal of Business Case Studies** 6(3)

EDITORIAL/REVIEWER EXPERIENCE

Editorial

(2010 – present) Editorial Board Member: Southeast Business Research Association Journal

(2008-2018) Editorial Advisor: Journal of Accountancy

Textbook Reviewer

2019 Taxation of Individuals, Spilker et al (2020 edition)

2019 Financial and Managerial Accounting, Wild et al (8th edition)

(2015 – present) Income Tax Fundamentals, Whittenburg et al

2011 Corporations, Partnerships, Estates and Trust, Hoffman et al (34 edition)

2010 Corporations, Partnerships, Estates and Trust, Hoffman et al (33 edition)

2008 Fundamentals of Taxation, Cruz et al (2009 edition)

Certified Professional Education Reviewer

2014 – present National Association of State Boards of Accountancy
National Certified Professional Education Courses Registry Reviewer

FUNDRAISING/SCHOLARSHIPS/GRANT AWARDS

2019 Proctor & Gamble and UNCF. \$10,000

2013 Dixon Hughes Goodman. \$8,000

2013 – 2016 AICPA Foundation. \$10,000/year

2012 Deloitte Foundation. \$21,000

2012 Accounting Career Awareness Program. \$15,000

2012 Path to Financial Independence
Norflet Fund Subcontract. \$2,000

2011 Path to Financial Independence
Norflet Fund Subcontract. \$14,000

2011 PwC Inquiries Grant. \$10,000

2009 Path to Financial Independence
Kellogg Foundation Subcontract. \$22,000

2007 Howard University New Faculty Grant. \$15,000

2007 Howard University Fund for Academic Excellence Grant. \$4,940

STUDENT CASE COMPETITIONS – FACULTY ADVISOR

Apr. 2020 Deloitte Audit Innovation Case Challenge: National finalist

Mar. 2020 Georgia State University, Center for International Business Education and Research
Case Competition

Nov. 2019 Deloitte Audit Innovation Case Challenge: Regional finalist – advanced to Nationals

July 2019 Proctor & Gamble and UNCF HBCU Business Challenge Competition: Winner

May 2019 Proctor & Gamble and UNCF HBCU Business Challenge Competition: Finalist

Apr. 2019 Deloitte Audit Innovation Case Challenge: 3rd place, Nationals

Apr. 2019 Mt. St. Mary's University Business Ethics Case Competition: 2nd place

Mar. 2019	Georgia State University, Center for International Business Education and Research Case Competition, 1 st and 3 rd place teams
Nov. 2018	Deloitte Audit Innovation Case Challenge: Regional finalist – advanced to Nationals
Nov. 2017	Deloitte Audit Innovation Case Challenge: Regional finalist – advanced to Nationals
Sept. 2017	NBMBAA Undergraduate Minority Business Case Competition
Jan. 2017	KPMG International Case Competition: Semifinalist
Apr. 2016	Mt. St. Mary’s University Business Ethics Case Competition: Winners
Mar. 2016	Georgia State University, Center for International Business Education and Research Case Competition, 1 st and 2 nd place teams
Sept. 2015	NBMBAA Undergraduate Minority Business Case Competition
Apr. 2015	Mt. St. Mary’s University Business Ethics Case Competition: Winners
Feb. 2015	KPMG International Case Competition: National Finalist
Jan. 2015	KPMG International Case Competition: Semifinalist
Apr. 2013	Deloitte Student Case Competition: Regional finalist – advanced to Nationals
Nov. 2013	Deloitte Student Case Competition: 1 st place, Nationals

SERVICE ACTIVITIES

University, School and Department

Coordinator: Internal Revenue Service Volunteer Income Tax Assistance Program (2005 – present)

- Supervise the volunteers who prepare hundreds of income tax returns each tax season

Member: Path to Financial Independence: HBCU Coalition (2009 – 2013)

Member: Howard University Strategic Plan Faculty Task Force I – Member (2017)

Coordinator: Business Law course (2018)

Coordinator: Master of Accountancy Program (2018)

Chair: Department Chair Search Committee (2016)

Facilitator: National Association of Black Accountants - Aspiring Leaders Development Institute (2014-present)

Presenter: Summer Pre-College Program (2008)

Committee Chair: Faculty-Student/Community Relations/International Student Committee (2006-2010)

Member: School of Business Judiciary Committee (2004-2005)

Member: School of Business Recruitment Committee (2004-2005)

Faculty Advisor: Beta Alpha Psi Student Chapter

Faculty Advisor: National Association of Black Accountants Student Chapter

Member: School of Business, Admissions Committee (2014-2015)

Member: School of Business Executive Committee (2014-2015)

Presenter: Accounting Career Awareness Program (2011-2020)

Presenter: Accounting Scholars Development Program (2013-2016)

Judge: MBA Case Study Competition (2004)

Reviewer: Fund for Academic Excellence Grants Program (2007-2008)

Center for Accounting Education:

- Leadership Skills Development Program Advisory Working Group (2005-2015)
- Research Project Advisory Working Group (2005-2015)

American Accounting Association

- Ernst & Young Grant Review Committee Member – Diversity Section (2008)

American Institute of Certified Public Accountants

- Tax Legislative and Policy Committee (2009 – 2012)
- Minority Initiatives Committee (2009 – 2012)
- Editorial Advisor – Journal of Accountancy (2008-2018)
- Examinations Committee – Regulations Subcommittee Member (2020-present; 2004-2007)
- Academic Advisor – National Commission on Diversity and Inclusion Initiative Proposal (2014)

American Tax Association

- Tax Policy - Complexity Reduction Committee Member

American Association of Attorney-Certified Public Accountants

- IRS Tax Liaison Committee Member

TAX COMMUNITY SERVICE AWARDS

2008 & 2009 DC Earned Income Tax Credit Campaign
School of Business Award of Appreciation
Outstanding Community Partnership in Supporting the Volunteer Tax Program

2006 & 2007 DC Creating Assets, Savings and Hope
School of Business Award of Appreciation –
Outstanding Community Partnership in Supporting the Volunteer Tax Program

FACULTY DEVELOPMENT: GLOBAL

2019 Havana, Cuba
Center for International Business Education and Research
Faculty Development in International Business

2018 Colombia: Medellin, Cartagena, Bogota and Barranquilla
World Strides ISA Faculty Familiarization Experience

2017 London, England
Global Business and Economics Abroad Experience
Howard University School of Business Executive Leadership Honors Program

2017 Egypt and Rwanda
Center for International Business Education and Research
Faculty Development in International Business

2013 South Africa, Zimbabwe and Botswana
Center for International Business Education and Research
Faculty Development in International Business

PROFESSIONAL DEVELOPMENT

AACSB International Conference and Annual Meeting (2012/2013/2018)
Washington Business Research Forum (2018)
HBCU Business Deans Roundtable Summit (2018)
American Accounting Association Diversity Conference (2013/2015/2018/2019)
American Accounting Association Annual Conference (2013/2014/2015/2016/2017/2018)
Deloitte Foundation Tax Faculty Symposium (2013/2014/2015/2016/2017)
PwC Accounting and Tax Symposium (2012/2013/2014/2015/2016/2017/2018/2019)
KPMG Faculty Symposium (2013/2014/2015/2016/2018/2019)
Southeast Case Research Association Annual Meeting (2009/2010/2011)
Internal Revenue Service Nationwide Tax Forum (2010/2012/2013/2014)
Beta Alpha Psi Regional Conference (2013/2016)
Beta Alpha Psi National Conference (2013)
National Association of Black Accountants Convention (2013/2014/2015/2016/2017/2018/2019)
Howard University Research Retreat (2016/2017)
Tax Council Policy Institute Annual Tax Policy and Practice Symposium (2013/2014/2015/2016/2017)
Southern Academy of Legal Studies in Business Annual Conference (2009/2010)
American Accounting Association Accounting Leadership Group Conference (2012)
Common Cents Conference (2010)
CFED Assets Learning Conference (2010)

PROFESSIONAL MEMBERSHIPS

American Accounting Association
District of Columbia Bar
American Institute of Certified Public Accountants

NON-ACADEMIC WORK EXPERIENCE

- Deloitte and Touche**, Washington National Tax Policy Services, *Tax Manager* 2001 - 2004
- Tracked and summarized IRS guidance and Treasury regulations
 - Updated tax publications to reflect changes in tax laws
- MCI Telecommunications**, *Tax Attorney* 1999 - 2001
- Researched and responded to IRS Large Case Audit Information Document Requests
 - Responded to internal company-wide inquiries on various tax topics
- BNA-Tax Management**, *Federal Tax Law Editor* 1998 - 1999
- Summarized and abstracted IRS and Treasury publications and tax cases
 - Updated Portfolios in Partnership, Corporations, and Accounting series
- Tax Analysts**, *Legal Editor - International Tax* 1997 - 1998
- Summarized and abstracted international court cases, legislation, and technical interpretations
- The George Washington University Law School**, *Tax Research Assistant* 1997
- Summarized effect of 1997 tax changes on corporate spin-offs and debt-like preferred stock
 - Updated tax issues in Corporate Acquisition, Mergers and Divestitures treatise
 - Analyzed new IRS tax regulations on consolidated returns, debt restructuring & intangibles
 - Reviewed and edited book chapter on Generation Skipping Transfer tax
- Pace Financial Network, LLC**, *Law Clerk* 1997
- Researched state taxes issues: property, sales/use tax, withholding and estimated income tax
 - Prepared Quality Control Plan for Fannie Mae and HUD mortgage service applications
 - Analyzed regulatory issues on insurance and SEC broker/dealer disclosure requirements
- Price Waterhouse**, *Senior Accountant* 1995
- Conducted financial audit of multinational hotel group chain
 - Coordinated, compiled and submitted consolidated financial statements to hotel headquarters
 - Delegated, supervised and reviewed two assistant accountants work product
- Bert Smith & Company, CPAs**, *Senior Accountant*, 1992 - 1994
- Performed annual financial audit of the District of Columbia government
 - Conducted compliance audits of nursing homes to ensure propriety of Medicaid payments
 - Audited various nonprofit organizations and private companies
- Steve Alleyne and Company, CPAs**, *Tax Accountant*, 1991
- Prepared individual, corporate, and nonprofit annual tax returns
 - Calculated payroll withholdings and federal tax liabilities
- Price Waterhouse**, *Staff Accountant*, Summer 1989
- Assisted in the audit of hotels, banks, supermarkets and other entities
 - Prepared various reports for financial statement presentation
- KPMG Peat Marwick**, *Assistant Accountant*, 1986 - 1988
- Generated monthly financial statements and performed variance analysis
 - Maintained the firm's accounts receivable ledger and tracked delinquent accounts