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May 2019

Dear colleagues,

On behalf of the Federation of Schools of Accountancy (FSA), I would like to welcome you to the 17th annual Deloitte Foundation — FSA Faculty Consortium. We are thrilled to be back at Deloitte University and are grateful for the generous support of the Deloitte Foundation, which has made this year’s program possible.

The 2019 Consortium program is entitled “Analytics, Technology, and Business Transformation.” As in the past, thought leaders from academe and practice will give presentations and moderate events throughout the program. Participants will benefit through active learning and participation in building team-based solutions for the cases under the guidance of Deloitte professionals. These cases provide an excellent resource for future classroom use at member schools.

The annual consortium is organized with professional relevance and classroom usefulness in mind. The theme for this year’s content focuses on how technology and analytics are transforming business and audit practice. This transformation has profound implications for the environment our students are entering and the skills they will need to be successful. The program includes real-world case studies developed and delivered by Deloitte professionals. The FSA is pleased to receive Deloitte’s support in the development and presentation of this highly applicable material. We thank them for their support.

Thank you to you as well for your continued support of the Federation of Schools of Accountancy and this program. Your attendance and active participation help make this a dynamic learning environment. The goal of the Deloitte Foundation — FSA Faculty Consortium is to help FSA member schools continue to develop current, relevant accountancy programs that provide students a pathway to entry and success in the profession.

Your feedback on this and future consortiums is welcome. Thank you for your participation.

Sincerely,

Craig White
FSA President
**Hotel Information**

Deloitte University  
One Deloitte Way  
Westlake, TX 76262  
Phone: 682.388.1000

Messages can be left for attendees by calling the above number.

**Location of Sessions**

All sessions on Friday, May 17, will be in Westlake Hall on the first floor of Deloitte University. All sessions on Saturday, May 18, with the exception of the wrap-up discussion, will be in Westlake Hall on the first floor of Deloitte University. The wrap-up discussion will be located in the Amphitheater.

**Refreshment Breaks**

Refreshments, including Starbucks, non-alcoholic beverages and food offerings, at The Market, Bistro 375, The Barn, break stations near the classrooms, and the stocked pantries located on the guestroom floors that are open 24/7 (City Places) are available free of charge. All alcohol, other than what is provided as part of the reception, is a personal expense.

**Reception**

A networking reception will be held on Friday, May 17, on the Pondside Patio from 7:00–7:30pm.
GENERAL INFORMATION

Safety and Security Information

The safety and security of attendees is our first priority. Should you have or be aware of an emergency, please be prepared to provide the following information immediately:

• Nature of the emergency
• Exact location of the emergency

To report an emergency:

Dial “0” from any phone or alert any Deloitte University employee.

Services

Badges: Access to Deloitte University is restricted to registered guests and everyone must wear name badges while onsite and while attending the conference.

Baggage Check: Ask for the service of a hotel bellman. Cash is not necessary for your stay, and there is no tipping at Deloitte University. Please express your appreciation to staff instead with a big “thank you” and generous feedback.

CPE Forms: To obtain your CPE credit, fill out the form turn it in at the back of the Amphitheater or Westlake Hall. Please keep the yellow copy for your records.

Lost and Found: Check with the front desk.

Smoking Policy: Deloitte University is a smoke-free facility, and smoking is only permitted in designated outdoor areas.

Cellular Phones

As a courtesy to our speakers and your fellow conference attendees, please silence cellular telephones during all conference sessions.
## BOARD OF DIRECTORS

### OFFICERS

<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
<th>School/University</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>Craig White</td>
<td>University of New Mexico</td>
<td><a href="mailto:white@mgt.unm.edu">white@mgt.unm.edu</a></td>
</tr>
<tr>
<td>Treasurer</td>
<td>Sean Robb</td>
<td>University of Central Florida</td>
<td><a href="mailto:srobb@ucf.edu">srobb@ucf.edu</a></td>
</tr>
<tr>
<td>Vice President/Elect President</td>
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<td>Florida International University</td>
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</tr>
<tr>
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<td>Parveen Gupta</td>
<td>Lehigh University</td>
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</tr>
<tr>
<td>Secretary</td>
<td>Jennifer Mueller-Phillips</td>
<td>Auburn University</td>
<td><a href="mailto:jmp@auburn.edu">jmp@auburn.edu</a></td>
</tr>
</tbody>
</table>

### MEMBER SCHOOLS

<table>
<thead>
<tr>
<th>Name</th>
<th>School</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Irving</td>
<td>James Madison University</td>
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<td><a href="mailto:Richard.Dull@mail.wvu.edu">Richard.Dull@mail.wvu.edu</a></td>
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### SUPPORTING ASSOCIATES

<table>
<thead>
<tr>
<th>Name</th>
<th>Company</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kristina Chernick</td>
<td>Deloitte Services LP</td>
<td><a href="mailto:KChernick@deloitte.com">KChernick@deloitte.com</a></td>
</tr>
<tr>
<td>Lisa Francisco</td>
<td>KPMG LLP</td>
<td><a href="mailto:LFrancisco@kpmg.com">LFrancisco@kpmg.com</a></td>
</tr>
</tbody>
</table>

### NONPROFIT ASSOCIATES

<table>
<thead>
<tr>
<th>Name</th>
<th>Organization</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stephanie Bryant</td>
<td>AACSB</td>
<td><a href="mailto:Stephanie.Bryant@aacsb.edu">Stephanie.Bryant@aacsb.edu</a></td>
</tr>
</tbody>
</table>
Friday, May 17, 2019

1:00–1:50pm  Optional tour of Deloitte University

2:00–2:10pm  Welcome and announcements

2:10–3:40pm  Plenary Session: Technology and Audit Transformation  
*Presenter:* Brian Crowley, Senior Manager, Deloitte & Touche LLP

3:40–4:00pm  Break

4:00–5:30pm  Let’s Practice Some ABCs of Data Analytics  
*Presenter:* Katie Terrell, University of Arkansas

5:30–7:00pm  Free time or optional tour of Deloitte University

7:00–7:30pm  Reception

7:30–8:45pm  Dinner

Please note that all presenters and the session schedule are subject to change.

Personal video or audio recording (by cellphone, cameras, tape recorders, etc.) of the sessions is strictly prohibited.
## Saturday, May 18, 2019

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>6:30–8:00am</td>
<td>Breakfast</td>
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<tr>
<td>8:00–8:10am</td>
<td>Welcome and announcements</td>
</tr>
<tr>
<td>8:10–9:40am</td>
<td>Case Study Example: The Cognitive Audit and Data Curiosity</td>
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<tr>
<td></td>
<td><strong>Presenter:</strong> Brian Crowley, Senior Manager, Deloitte &amp; Touche LLP</td>
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<tr>
<td>9:40–10:00am</td>
<td>Break</td>
</tr>
<tr>
<td>10:00–11:30am</td>
<td>Case Study Example: Leveraging Data Visualization in Risk Assessment</td>
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<td></td>
<td><strong>Presenters:</strong> Erica Nelson, Partner, Deloitte &amp; Touche LLP</td>
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<td>Danielle Kearney, Senior Manager, Deloitte &amp; Touche LLP</td>
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<tr>
<td>11:30am–12:30pm</td>
<td>Lunch</td>
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<tr>
<td>12:30–2:00pm</td>
<td>Case Study Example: Data and the New Leasing Standard</td>
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<td><strong>Presenters:</strong> Patricia Strack, Manager, Deloitte &amp; Touche LLP</td>
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<td>Andrea Perdomo, Manager, Deloitte &amp; Touche LLP</td>
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<tr>
<td>2:00–2:45pm</td>
<td>Wrap-up Discussion: Skillsets of the Future/Implications for Curriculum</td>
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<td><strong>Panelists:</strong> Brian Crowley, Senior Manager, Deloitte &amp; Touche LLP</td>
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<td></td>
<td>Erica Nelson, Partner, Deloitte &amp; Touche LLP</td>
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<td>Andrea Perdomo, Manager, Deloitte &amp; Touche LLP</td>
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<tr>
<td></td>
<td>Katie Terrell, University of Arkansas</td>
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<tr>
<td>2:45–3:00pm</td>
<td>Closing remarks and adjournment</td>
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</table>
Brian Crowley

Brian Crowley is a senior manager within the Audit and Assurance practice, currently working in Audit Innovation, specializing in Artificial Intelligence and Machine Learning and is currently based in Stamford, CT. His role involves identifying, evaluating, and leading the development of artificial intelligence solutions and capabilities that elevate audit quality, enhance operational excellence and energize our professionals.

Prior to his current role, Brian spent time serving audit clients in the diversified manufacturing and commodity trading space and in the Audit & Assurance Services Group within the firm’s Professional Practice Network (National Office) in Wilton, CT, specializing in internal controls, inventory, and management representation letters. In that role, he aided the broader Audit and Assurance practice by assisting in the development of various guides, tools and training materials. Other duties included serving as an audit consultation resource for engagement teams.

As a lifelong Connecticut resident, Brian lives in Fairfield. He received both his bachelor of science and master of science in accounting from the University of Connecticut.

Danielle Kearney

Danielle Kearney, senior manager, Deloitte & Touche LLP leads marketing and strategy for US Audit Analytics. In addition, she serves a quality role and is very involved in regulatory and standard-setting activities relating to innovation in the audit. Danielle currently participates in the PCAOB Data and Technology Task Force and the AICPA’s RADAR Task Force. She is also involved in Deloitte’s global efforts around innovation. Prior to her current role, Danielle was a Data Analytics Subject Matter Expert in the Audit & Assurance Services Group. Danielle also has experience in the financial services industry. She served several large banking and investment management clients in the Boston Office, prior to taking a role in National Office. Today she serves an EQCR Assistant role on one of the largest investment management clients at Deloitte. Danielle lives in Massachusetts with her three daughters and husband. She is passionate about running and most recently completed the 2018 Boston Marathon.

Erica Nelson

Erica Nelson is an audit partner in Deloitte’s Investment Management practice, as well as the co-leader for the US Audit Analytics practice. In her over 25 years in public accounting, she has worked with a wide variety of investment companies including hedge funds, commodity pools, fund of funds and private equity funds. She provides a variety of services including financial audits and related consulting services and have managed numerous audit engagements and special projects for clients of all sizes, both public and private. In her role as audit analytics co-leader, she leads Deloitte’s efforts around talent, recruitment, learning development and eminence for Deloitte’s Audit Analytics practice to bring the power of data analytics to the audit. She also collaborates with Deloitte member firms around the world to enable practitioners to deliver quality, insight-driven audits leveraging analytics methodologies and technologies. Additionally, she serves as an engagement quality control reviewer for the investment management, securities and real estate industries.
SPEAKER BIOS

Andrea Perdomo

Andrea Perdomo, Manager, Deloitte & Touche LLP, began her National Office assignment in Accounting and Reporting Services in July 2018. She serves clients in a variety of industries and specializes within the energy, resources and industrial Products industry. She has public accounting experience providing accounting advisory services and audit and attest services to public and private companies. Her skills include technical accounting research and advising clients on SEC reporting matters. In her role, she performs technical accounting analysis, reviews of accounting policies, reviews of financial statements and registration statements for compliance with SEC Rules and SOX 404 controls testing and process documentation.

Kathy Shoztic

Kathy Shoztic is the Executive Director of the Deloitte Foundation, a non-profit organization that aims to accelerate education innovation to help develop the next generation of leaders. Kathy serves as a primary liaison between the academic community and Deloitte and leads many national programs and initiatives to help better prepare students for college and careers. Higher education initiatives include undergraduate, graduate and educator programs across audit, advisory, tax, and consulting that complement classroom learning; curriculum resources; and Ph.D. development programs and financial support to help strengthen the pipeline of professors. College readiness efforts focus on creating STEM experiential learning and mentoring opportunities to introduce underrepresented high school students to multiple career pathways. Kathy also manages the Foundation’s Matching Gifts Program which, coupled with contributions from Deloitte professionals, provides more than $14 million annually to U.S. higher education.

She is currently a member of the American Accounting Association (AAA), AAA Advisory Group, AAA Trueblood Seminars Committee and the Pace University Women in Business Alumnae Council. She is a past recipient of the Federation of Schools of Accountancy (FSA) Practitioner Service Award in recognition of her contributions and service to the accounting academic community, and has served on numerous boards and committees of the AAA, AICPA, FSA and the Pathways Commission. Kathy received her B.B.A. in Accounting and M.B.A. from Pace University, and worked in higher education prior to beginning her career with Deloitte.
Patricia Strack

Patricia Strack, manager, Deloitte & Touche LLP, began her career at Deloitte in 2012 within the Audit & Assurance practice. She has primarily served clients within the Consumer & Industrial Products group during her tenure at the firm. Patricia has worked on both public and private audit engagements and has experience with bankruptcy, going concern, first-time audits of both public and private companies, and first-time SOX implementation. Patricia began a role in the national office within the PPN Audit Group in August 2018, where she serves global engagement teams and assists in the publication of audit resources for the practice. Patricia has spent her entire career in the Chicago office. Patricia holds a Master of Accountancy at the University of Wisconsin-Madison.

Katie L. Terrell

Katie L. Terrell is an instructor in the Sam M. Walton College of Business at the University of Arkansas. She received her BA degrees in English Literature and in the Spanish language from the University of Central Arkansas and her MBA from the University of Arkansas. She expects a doctoral degree by 2019. In addition to teaching at the University of Arkansas, Terrell has taught students around the world, including at Soochow University in China, University College Dublin in Ireland, and Duoc UC, a branch of the Catholic University of Chile.

She is a member of the American Accounting Association and has published a Statement on Management Accounting for the Institute of Management Accountants on managing organizational change in operational change initiatives. This year, Terrell was named the 2019 Business Professional of the Year (Education) by the national Beta Alpha Psi organization. She has recently been recognized for her innovative teaching by receiving the Mark Chain/FSA Teaching Award for innovative graduate-level accounting teaching practices in 2016. Prior to starting her career in academia, she worked with Tyson Foods, where she held various information system roles, focusing on business analysis, project management for ERP implementations and upgrades and organizational change management.

She is a co-author of the college-level textbook Data Analytics for Accounting, currently in its first edition published by McGraw Hill, and is passionate about covering data analytics across the accounting curriculum.
LIST OF ATTENDEES

Stephanie Bryant  
AACSB, FSA Board Member  
Steve Matzke  
AICPA  
Megan Tarasi  
AICPA, FSA Administrator  
Mindy Wolfe  
Arizona State University  
Travis Holt  
Auburn University  
Jennifer Mueller-Phillips  
Auburn University, FSA Board Member  
Erik Johannesson  
Baruch College/CUNY  
Carie Ford  
Baylor University  
Ken House  
Belmont University  
Joy Gray  
Bentley University  
Troy Hyatt  
Boise State University  
Bill Heninger  
Brigham Young University  
Walied Keshk  
California State University – Fullerton  
Gregory Jonas  
Case Western Reserve University  
Steve Harrast  
Central Michigan University  
Jeremy Vinson  
Clemson University  
Deborah Smith  
Cleveland State University  
Abe Carr  
Creighton University  
Janet Butchko  
Deloitte Foundation  
Kristy Chernick  
Deloitte Foundation, FSA Board Member  

Kathy Shoztic  
Deloitte Foundation, Speaker  
Brian Crowley  
Deloitte & Touche LLP, Speaker  
Danielle Kearney  
Deloitte & Touche LLP, Speaker  
Erica Nelson  
Deloitte & Touche LLP, Speaker  
Andrea Perdomo  
Deloitte & Touche LLP, Speaker  
Patricia Strack  
Deloitte & Touche LLP, Speaker  
Mark Alford  
DePaul University  
Antoinette Smith  
Florida International University  
FSA Board Member  
Geoffrey Adams  
Florida State University  
Hyo Kim (Mindy)  
George Mason University  
Tim Pearson  
Georgia Southern University  
Amanda Beck  
Georgia State University  
Matt Hoag  
Gonzaga University  
Marcus Burger  
Idaho State University  
Deborah Lindberg  
Illinois State University  
Lori Bhaskar  
Indiana University – Bloomington  
Cynthia Jeffrey  
Iowa State University  
James Irving  
James Madison University  
FSA Board Member  
Mark Sheldon  
John Carroll University
LIST OF ATTENDEES

Brooke Beyer
Kansas State University

Drew Sellers
Kent State University

Lisa Francisco
KPMG LLP, FSA Board Member

Parveen Gupta
Lehigh University, FSA Board Member

John Lauck
Louisiana Tech University

Jalal Soroosh
Loyola College in Maryland

Joe Wall
Marquette University

Susan Lanham
Marshall University

Gregory Tapis
Missouri State University

Yu Cong
Morgan State University

Cindy Seipel
New Mexico State University

Martin Ndicu
Northern Illinois University

David Stott
Ohio University

Angela Spencer
Oklahoma State University

Maria Sanchez
Rider University

Yan Luo
San Diego State University

Shucui Zheng
Southern Illinois University at Carbondale

Brad Reed
Southern Illinois University at Edwardsville

Nina Dorata
St. John’s University

Jeremiah Green
Texas A&M University

Renee Olvera
Texas Christian University

Billy Brewster
Texas State University

Heather Carrasco
Texas Tech University

Mitch Wenger
The University of Mississippi

Lauren Cunningham
The University of Tennessee-Knoxville

Trevor Shonhiwa
Truman State University

Alex Ampadu
University at Buffalo

Thomas G. Calderon
University of Akron

Daphne Palmer
University of Alabama

Teri Conover
University of Alabama at Birmingham

Ingrid Fisher
University of Albany, SUNY

Thomas Hayes
University of Arkansas

Katie Terrell
University of Arkansas, Speaker

Elizabeth (EB) Pziemski
University of Central Florida

Sean Robb
University of Central Florida

Don Wengler
FSA Board Member

Carolyn Gleason
University of Central Missouri

George Plesko
University of Colorado Denver

Debbie Archambeault
University of Dayton

Suzette Loving
University of Denver
LIST OF ATTENDEES

Jenny Tucker  
University of Florida

Jenny McCallen  
University of Georgia

Zhaohui (Randall) Xu  
University of Houston - Clear Lake

Ram Ramakrishnan  
University of Illinois at Chicago

Justin Leiby  
University of Illinois at Urbana Champaign

Jon Davis  
University of Illinois, FSA Board Member

Kay Hegarty  
University of Iowa

Monika Causholli  
University of Kentucky

Russell Williamson  
University of Louisville

Matt Sherwood  
University of Massachusetts Amherst

Sundaresh Ramnath  
University of Miami

Leah Baer  
University of Missouri-Columbia

Stuart Dearden  
University of Nebraska – Lincoln

Craig White  
University of New Mexico

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Uday Murthy  
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Dan O’Leary  
University of Southern California

Don McConnell  
University of Texas – Arlington

Stephen Smith  
University of Texas – Austin

Joseph Mauriello  
University of Texas – Dallas

Rebeca Perez  
University of Texas – El Paso

K.K. Raman  
University of Texas – San Antonio

Xiaofeng (Sheldon) Peng  
University of Toledo

Roger Martin  
University of Virginia, McIntire School

Bruce Bird  
University of West Georgia

Nate Stephens  
Utah State University

Bob West  
Villanova University

Jamie (Mi) Zhou  
Virginia Commonwealth University

Sean Hillison  
Virginia Tech

Doug Beets  
Wake Forest University

Calloway School

Norma Ramirez  
Wake Forest University

FSA Board Member

Jeff Davis  
Weber State University

Trevor Sorensen  
West Virginia University

Richard Dull  
West Virginia University

FSA Board Member

Cari Burke  
Western Michigan University

Jim Greenspan  
Wright State University
Thank you attendees.

We appreciate your continued support of the FSA through your attendance and wish you continued success through the coming year.