STEPHEN T. LIMBERG
December 10, 2013

McCombs School of Business
Department of Accounting
2110 Speedway, B6400
The University of Texas
Austin, Texas 78712-1281
stephen.limberg@mccombs.utexas.edu

Education

Ph.D., Taxation
Arizona State University (ASU), 1982

M.B.A., Accounting
San Diego State University (SDSU), 1975

B.A., Economics
Occidental College, Los Angeles, California, 1972

Academic Emphasis

Research

In the past, the role of taxes and other regulations in international management and policy decisions.

Teaching

Financial reporting

Employment History

The University of Texas at Austin
Faculty Director, MPA Program, 2006-present
Chair, Department of Accounting, 1997-2003
PricewaterhouseCoopers Centennial Professor in Accounting, 1995-present
Professor, September 1993
Associate Professor, September 1987-August 1993
Assistant Professor, September 1982-August 1987

INSEAD and ESCP-EAP European School of Management, Paris, France
Visiting professor, 2004

Fundação Getúlio Vargas, São Paulo, Brazil
Philips Visiting Professor in International Business, 1996

Center for Iberian and Latin American Studies, University of California, San Diego
Visiting Scholar, June 1995-January 1996

Arizona State University
Faculty Associate, September 1981-September 1982

San Diego State University
Accounting Instructor, September 1978-September 1979

Arthur Andersen & Co.
Tax Specialist, January 1976-September 1978

Research

Published articles

Cloyd, C. Bryan, Stephen T. Limberg, and John R. Robinson, "The Impact of Federal Taxes on the Use of Debt by Closely-Held Corporations," *National Tax Journal*, vol. L, no. 2, June 1997, pp. 261-277. Supported by a grant from the College of Business Faculty Research Committee at The University of Texas at Austin.

Limberg, Stephen T., John R. Robinson, and Raimundo L.M. Christians, "International Transfer Pricing Strategies for Minimizing Global Income Taxes," *Revista de Adminstração de Empresas*, vol. 37, no. 2, 1997, pp. 68-75.

Limberg, Stephen T., John R. Robinson, and Raimundo L.M. Christians, "International Transfer Pricing Restrictions: Impact on Corporate Financial Policy," *Revista de Adminstração de Empresas*, vol. 37, no. 3, 1997, pp. 28-41.

Limberg, Stephen T., John R. Robinson and Michael S. Schadewald "Financial Strategies for Minimizing Corporate Income Taxes Under Brazil's New Global Tax System," *Revista de Adminstração de Empresas*, vol. 37, no. 1, 1997, pp. 41-52.

Limberg, Stephen T., Michael S. Schadewald, and Brian C. Spilker, "Organizing Tax Instruction: Evidence Regarding Students' Knowledge Organization," *Journal of Accounting Education*, vol. 13, no. 1, 1995, pp. 45-58. Supported by a grant from the Ernst & Young Foundation, Research Program in Taxation.

Kachelemeir, Steven J, Stephen T. Limberg, and Michael S. Schadewald, "Experimental Evidence of Market Reactions to New Consumption Taxes," *Contemporary Accounting Research*, (with S. Kachelmeier and M. Schadewald), Spring 1994, vol. 10., no. 2, pp. 505-545. Supported by a grant from the Ernst & Young Foundation, Research Program in Taxation.

Wilkie, Patrick J. and Stephen T. Limberg, "Measuring The Explicit Tax (Dis)Advantages for Corporate Taxpayers: An Alternative to Average Effective Tax Rates," *Journal of the American Taxation Association*, vol. 15, no. 1, Spring 1993, pp. 46-71. Supported by a grant from the Arthur Young Foundation, Research Program in Taxation.

Schadewald, Michael S. and Stephen T. Limberg, "Effect of Information Order and Accountability on Causal Judgments in a Legal Context," *Psychological Reports*, vol. 71, 1992, pp. 615-625.

Schadewald, Michael and Stephen Limberg, "Using Pictorial Models to Teach Complex Tax Rules: An Experimental Investigation," *Journal of Accounting Education*, vol. 10, no. 1, 1992, pp. 133-149 (with M. Schadewald). Supported by a grant from the Ernst & Young Foundation, Research Program in Taxation.

Kachelemeir, Steven J, Stephen T. Limberg, and Michael S. Schadewald "A Laboratory Market Examination of the Consumer Price Response to Information about Producers' Costs and Profits," *The Accounting Review*, vol. 66, no. 4, October 1991, pp. 694-717. Supported by a grant from the Ernst & Young Foundation, Research Program in Taxation.

Kachelemeir, Steven J, Stephen T. Limberg, and Michael S. Schadewald "Fairness in Markets: A Laboratory Investigation," *Journal of Economic Psychology*, vol. 12, September 1991, pp. 447-464. Supported by a grant from the Policy Research Institute, University of Texas (Austin).

Wilkie, Patrick J. and Stephen T. Limberg, "The Relationship Between Firm Size and Effective Tax Rate: A Reconciliation of Zimmerman [1983] and Porcano [1986]," *Journal of the American Taxation Association*, vol. 11, no. 2, Spring 1990, pp. 76-91. Supported by a grant from a UT CBA Summer Research Grant and the Arthur Young Foundation, Research Program in Taxation.

Schadewald, Michael and Stephen Limberg, "Instructor-Provided Versus Student-Generated Explanations of Tax Rules," *Issues in Accounting Education*, vol. 5, no. 1, Spring 1990, pp. 30-40.

Limberg, Stephen T. and Sally Morrow Jones, "An Analysis of 'Substantiality' under the Section 704(b) Final Regulations," *Journal of the American Taxation Association*, vol. 10, no. 1, Fall 1988, pp. 60-74.

Fellingham, John C, Stephen T. Limberg and Patrick J. Wilkie, "Tax Rates, Tax Shelters and Optimal Portfolios," *Advances in Taxation*, vol. 1, 1987, pp. 23-48. Supported by a grant from the Arthur Young Foundation, Research Program in Taxation.

Limberg, Stephen T., "Incorporating Economic Uncertainty into the Tax Planning Curricula," *Advances in Accounting*, vol. 4, 1987, pp. 131-149.

Lightner, Kevin, Sharon M. Lightner and Stephen T. Limberg, "Solid Accounting Policy Needed for Data Base Publishers," *Data Management*, (vol. and no. not available) January 1987, pp. 24-27.

Deakin, Edward B. and Stephen Limberg, "Production Revenue Recognition for Integrated Oil Producers: Accounting, Taxation and Policy Issues," *Journal of Petroleum Accounting*, vol. 5, no. 3, Fall/Winter 1986, pp. 83-100 (with E. Deakin).

Limberg, Stephen T., "Master Limited Partnerships Offer Significant Benefits," *The Journal of Taxation*, vol. 65, no. 2, August 1986, pp. 84-92.

Limberg, Stephen T., "Treatment of Oil Exchanges Between Petroleum Companies: What Basis for Non Taxability?" *The Journal of Taxation*, vol. 64, no. 1, January 1986, pp. 38-41.

Jacobs, E. Allen and Stephen T. Limberg, "Tax Issues in Petroleum Industry Reorganization," *The Energy Journal: Energy Economics*, vol. 6, Summer 1985, pp. 331-351.

Limberg, Stephen T. and Sharon M. Lightner, "Despite Contrary Authority, Favorable Treatment of Prepublication Costs May still be Available," *The Journal of Taxation*, vol. 63, no.2, August 1985, pp. 82-85 (with S. Lightner).

Limberg, Stephen T., "Tax Planning for Condominium Conversions After DRA," *The Tax Adviser*, (vol. and no. not available) August 1985, pp. 460-468. Selected for summary in *Journal of Accountancy*, vol. 160, no. 2, August 1985, p. 80. Supported by URI Summer Research Award, University of Texas (Austin).

Jones, Sally Morrow and Stephen T. Limberg, "Corporate Transfers of Partnership Interests: An Analysis of New Section 386," *The Journal of Partnership Taxation*, vol. 1, no. 4, Winter 1985, pp. 291-309.

Limberg, Stephen T. and Robert Wyndelts, "When to Sell, When to Trade: Factors Affecting Tax Planning," *The Journal of Real Estate Taxation*, vol. 12, no. 2, Winter 1985, pp. 177-185.

Limberg, Stephen T., "Bradshaw Provides Support and Guidelines for Capital Gains in Condominium Conversions: An Analysis of the Court of Claims' Decision," *The Journal of Real Estate Taxation*, vol. 11, no. 4, Summer 1984, pp. 328-346.

Limberg, Stephen T. and Robert L. Black, "An Analysis of the Incentives Provided by the Rehabilitation Tax Credit," *The Journal of Taxation*, vol. 59, no. 6, December 1983, pp. 380-386.

Limberg, Stephen T. and Bill N. Schwartz, "Should You Use Multiple Asset Accounts?" *The C.P.A. Journal*, vol. LI, no. 10, October 1981, pp. 25-31.

Behm, Robert, Alvin Lybarger and Stephen Limberg, "Determining the Essential Elements of Occupational Courses," *Community College Research Quarterly*, vol. 3, no. 2, January-March 1979, pp. 121-128.

Behm, Robert J. and Steven T. Limberg, "Accountants and Teachers: Education Aims Are Similar," *The Journal of Studies in Technical Careers*, vol. 1, no. 3, Spring 1979, pp. 213-219.

Invited papers and talks

2003

"Fund-Raising," New Chairs' Seminar, APLG Annual Meeting, New Orleans, (February 2-4, 2003)

"Staffing with Nontenure-Track Faculty," New APLG Annual Meeting, New Orleans, (February 2-4, 2003)

"Leading vs Managing -- Panelist," APLG Annual Meeting, New Orleans, (February 2-4, 2003)

2002

"Developing Internship Opportunities," FSA Annual Meeting, Biloxi, Mississippi (Oct 17-19, 2002)

"Resource Development," New Chairs' Seminar, APLG Annual Meeting, Austin, TX (February 3)

2001

"Resource Development," New Chairs' Seminar, APLG Annual Meeting, Fort Lauderdale, FL (February 5)

"Advisory Councils and Alumni Involvement," APLG Annual Meeting, Fort Lauderdale, FL (February 5)

"Internships in Tax for Accounting Students," ATA Mid-year Meeting, Phoenix, AZ (February 17)

2000

"Using Advisory Boards Effectively--The University of Texas Experience," APLG Annual Meeting, Las Vegas, Nevada (February 8).

1999

"A Resource Development Strategy for Accounting Departments," APLG Annual Meeting, Orlando, Florida (February1).

"The Changing Landscape of Business: Considerations for Professional Education," IMA France, Paris (June 14).

"International Academic Collaboration," Ecole Superieure de Commerce de Paris, France (June 14).

"Challenges Facing Masters Programs in Accounting," Federation of Schools of Accountancy, Costa Mesa, California (December 7)

1997-Business Association of Latin American Schools, Rio de Janiero, Brazil (April).

"Financial Strategies for Minimizing Corporate Income Taxes Under Brazil's New Global Tax System," (with M. Schadewald) 1997.

"International Transfer Pricing Strategies for Minimizing Global Income Taxes," (with J. R. Robinson and R. Christians) 1997.

1996, Department of Accounting, Finance and Control, Fundação Getúlio Vargas, São Paulo, Brazil.

"Adapting Accounting Education to the Current Needs of Dynamic Markets" (June)

"How Management Decisions Are Affected by Tax Regulation: Literature and Pedagogy" (June)

"Avaliação Estrategica do Departamento" (October)

"Estrategias para Melhorar a Redação Acadêmica" (November)

"Estrategias para Augmentar a Capacidade Didática" (November)

"The Impact of Federal Taxes on Debt-Equity Structure: An Empirical Investigation of C and S Corporations"

1995 University of Michigan Tax Conference, Ann Arbor (April)

1994 Mid-year meeting of the American Taxation Association, Atlanta (February)

"The Role of Private Letter Rulings in Tax Reorganizations"

1993 Annual Meeting of the American Accounting Association, San Francisco (August)
1993 Accounting Colloquium Series, Arizona State University, Tempe, Arizona (May)
1993 Accounting Colloquium Series, University of North Texas, Denton, Texas (April)

"Experimental Evidence of Market Reactions to New Consumption Taxes"
1993 Contemporary Accounting Research Conference, Edmonton, Canada (May)
1992 Annual Meeting of the American Accounting Association, Washington D.C. (August)
1992 Accounting Colloquium Series, McMaster University, Hamilton, Ontario, Canada (March)
1991 Annual Meeting of the Economic Science Association, Tucson, Arizona (October)

"The Relationship Between Firm Size and Effective Tax Rate: A Reconciliation of Zimmerman [1983] and Porcano [1986]"
1991 Office of Tax Analysis, U.S. Department of Treasury
1991 Santa Clara University, Accounting Colloquium Series
1991 University of North Texas, Accounting Colloquium Series
1991 George Mason University, Accounting Colloquium Series

"A Laboratory Market Examination of the Consumer Price Response to Information about Producers' Costs and Profits"
1990 Annual Meeting of the Economic Science Association, Tucson, Arizona (October)

"Fairness in Markets: A Laboratory Investigation"
1989 University of Illinois Tax Research Symposium, Urbana (October)
1989 Joint National Conference of the Economic Science Association and Public Choice Society, Orlando, Florida (March)

"An Analysis of 'Substantiality' under the Section 704(b) Final Regulations"
1988 Decision Sciences Institute, Western Regional Conference (March)
1988 Accounting Colloquium Series, University of Nebraska

"Tax Issues in Petroleum Industry Reorganization"
1985 Conference on Mergers and Acquisitions, National Bureau of Economic Research, Cambridge, Mass. (July)

1985 Mergers and Acquisitions Conference, Stanford University, Palo Alto, California

"Dealer v. Investor Status"
1984 Presentation of research findings to a meeting of the Texas Society of Certified Public Accountants (December)

"Microcomputers in Tax Curricula: The University of Texas Experience"
1984 Presentation of research findings to the AICPA Graduate Tax Education Symposium, The University of Texas at Austin (May)

"Publication Cost Allocation in the Information Publishing Industry: A Survey of Current Financial and Tax Accounting Practices"
1984 American Institute of Decision Sciences Western Regional Conference (March)

"Assessing Economic Risk in Tax Planning"
1983 Annual Meeting, National Tax Association--Tax Institute of America, Seattle, Washington (October)

Editorial boards

The Accounting Review, 1993-1995
The Journal of the American Taxation Association, 1990-1994
Advances in Taxation, 1987-90
Journal of Petroleum Accounting, 1987-90

Ad hoc associate editor
The Accounting Review, 1991

Ad hoc reviewer

Journal in Accounting and Public Policy, 2008, 2009
Issues in Accounting Education, 1994
Accounting Horizons, 1994
Journal of Accounting Research, 1990-1992
The Accounting Review, 1989-1993
The Journal of the American Taxation Association, 1985-1990, 2005
Advances in Taxation, 1986-1987
The Journal of Business Research (UT Austin), 1984

Invited participation at academic conferences and other research awards

Panelist, Becoming More Effective Teachers," American Taxation Association mid-year meeting, San Antonio, Texas, February 1995.

Presenter, "Special Topics in International Taxation," Fourth Annual Symposium: Internationalizing Business Education. The Center for International Business Education and Research, San Antonio, Texas, October 1994.

Ernst & Young Foundation, Visiting Professor Program, 1994-95.

Participant, Journal of Accounting Research Conference, Chicago, Spring 1992.

Moderator and discussant, expert panel, "Tax Implications of Trading Abroad," The Center for International Business Education and Research (CIBER) and the Department of Commerce, World Trade Center, Dallas, May 1992.

Moderator and discussant, "Internationalizing Accounting," Conference on Internationalizing Business Education, The Center for International Business Education and Research (CIBER), University of Texas at Austin, May 1991.

Moderator and discussant, "Current Issues in Tax Policy and Research, 1985 Accounting Association Annual Meeting, Reno, Nevada, August 1985.

Discussant, "Innovative Implementations of the Microcomputer into the Accounting Curriculum," Decision Sciences Institute, Western Regional Conference, Phoenix, Arizona, March 1986.

Competitive grants

2003 Faculty Research Assignment (FRA), University of Texas at Austin, International Tax Policy: A Study of the European Setting.

2001-2002 Faculty Research Assignment (FRA), not accepted, University of Texas at Austin, E-Commerce Tax Policy: A Study of the European Setting.

1997 $9,500 (approx.)--CBA Faculty Summer Research Award, Faculty Academic Development and Research Committee, "International Transfer Pricing Strategies for Minimizing Global Income Taxes."

1996 $9,500 (approx.)--CBA Faculty Summer Research Award, Faculty Academic Development and Research Committee, "Determinants of Organizational Form: An Empirical Analysis of Small Businesses," (with B. Ayers, B. Cloyd, and J.R. Robinson).

1995 Fall research leave, University Research Institute, The University of Texas at Austin, "A Model of Tax and Other Regulatory Factors Affecting International Business in the Americas."

1995 $15,300--Center for the Study of Western Hemispheric Trade, The University of Texas at Austin, "Taxation Strategies in the Western Hemisphere--Case Studies and a General Model."

1995 $9,100--CBA Faculty Summer Research Award, Faculty Academic Development and Research Committee, "Determinants of Organizational Form: An Empirical Analysis of Small Businesses," (with B. Ayers, B. Cloyd, and J.R. Robinson).

1994 $27,000--Ernst & Young Foundation Grant, Research Program in Taxation, "The Impact of Federal Taxes on Debt-Equity Structure: An Empirical Investigation of C and S Corporations," (with B. Cloyd and J.R. Robinson)

1994 $8,975--CBA Faculty Summer Research Award, Faculty Academic Development and Research Committee, "The Impact of Federal Taxes on Debt-Equity Structure: An Empirical Investigation of C and S Corporations," (with B. Cloyd and J.R. Robinson).

1993 $27,000--KPMG Peat Marwick Foundation Grant, Tax Research Opportunities Program, "The Role of Private Letter Rulings in Tax Reorganizations," (with D. deVidal and J. Robinson).

1993 $8,420--CBA Faculty Summer Research Award, Faculty Academic Development and Research Committee, "The Role of Private Letter Rulings in Tax Reorganizations," (with J. Robinson).

1993 $500--University Research Institute, special research grant, "The Role of Private Letter Rulings in Tax Reorganizations," (with D. deVidal and J. Robinson).

1992 $19,000--Ernst & Young Foundation Grant, Research Program in Taxation, "Effect of Graduate Tax Curriculum Organization on Students' Learning Strategies," (with M. Schadewald).

1991 $37,200--Ernst & Young Foundation Grant, Research Program in Taxation, "Taxes and Markets: An Empirical Study of Price and Volume Shifts," (with S. Kachelmeier and M. Schadewald).

1990 $22,600--Arthur Young Foundation Grant, Research Program in Taxation, "An Analysis of Firm Size and Tax Burden," (with P. Wilkie).

1990 $1,800--Policy Research Institute, summer research grant, "Taxes and Markets: An Experimental Study of Price and Volume Shifts," (with S. Kachelmeier and M. Schadewald).

1989 $11,369--CBA Faculty Summer Research Award, Faculty Academic Development and Research Committee, "Tax Expenditure Incentives: Taxonomy and an Analogy to Joint Costs."

1987 $10,444--University Research Institute, summer research grant, "An Empirical Analysis of the Differences Between Bidder versus Target Firms Engaged in Mergers and Acquisitions," (with T. B. Bell).

1986 $29,900--Arthur Young Foundation Grant, Research Program in Taxation, "The Role of Special Allocations in Partnership Agreements," (with J. Fellingham and P. Wilkie).

1986 $8,200--University Research Institute, summer research grant, "An Analysis of Condominium Transactions After the DRA."

1985 Project QUEST microcomputer systems support grant, 14 IBM microcomputers, "Microcomputer Tax Curriculum Development Program."

Other research awards

International Research Fellowship, Center for International Business Education and Research (CIBER), 1991-1993.

Ernst & Young Faculty Research Fellowship, 1989-1994.

Arthur Young Faculty Research Fellowship, 1985-89.

American Taxation Association Ph.D. Manuscript Award, 1981-82.

Ph.D. student dissertation committees

Supervisor--
Arthur Ridolfo Neto (co-supervisor), 1998-2002, Fundação Getúlio Vargas
José Carlos G. Alcântara, 1996-1997, Fundação Getúlio Vargas
Brian Spilker (co-supervisor), 1992-1993
Howell Lynch, 1985-87

Member--
Jennifer Brown, 2006-2007
Thomas Evans, 2002-2004, College of Education

Sharon Ann Dunn, 2001-2002, MSIS
Carlos Koury, 1996-1999, Fundação Getúlio Vargas
Shelley Rhoades, 1993-1995
Doug deVidal, 1990-1992
Will Yancey, 1990-91
Amy Dunbar, 1987-90
Letha Sparks, 1983-1989
Vance Grange, 1983-86

Ph.D. student program advisor

Elizabeth Plummer, 1988-1992
Will Yancey, 1987-90
Lewis Wright, 1983-85
Sydney Credle, 1984-85

Teaching

The University of Texas at Austin

DMBA Financial Accounting (BA384T, F11,F12, F13)
MBA Financial Accounting (BA284T F12. F11, F10, F09), (BA384T, F08)
Directed Studies in Global Management (Dallas & Houston MBA, BA391, 2014 – South Africa, 2013 – Turkey, 2012-Vietnam, 2011-Brazil, 2009-Vietnam, 2008-Shanghai)
Global Connections (full time MBA, BA391, 2011-South Africa, 2005-Russia)
Accounting Policy and Procedures (ACC 380K.19, summer study abroad program in Hong Kong), Sum07
MPA Distinguished Speaker Lyceum (ACC152), F06 - present
3rd Year MPA Lyceum (MPA ACC151), F08, F07, F06
Financial Accounting for MPAs (ACC 381), Sum07, Sum06
Accounting Practicum—Taxation of Low-Income Filers (BBA, MPA, MBA) ACC366P.ACC391, BA391), S06
Introduction to Financial Accounting (BBAs, ACC 311), F05
Plus Global – Russia, co-instructor (MBA), S05
Miscellaneous Tax Topics: Contemporary Tax Practice and Planning (ACC384.8, MPA), F03
Ph.D. Tax Seminar, F90
Ph.D. Research Methods in Accounting (summer paper), Sum87, Sum86
Tax Factors in Business Management (MBA), F91, S90, F86, S86, F85, S83, F82
Tax Planning and Practice (MPA), F03
Introduction to Federal Taxes (MPA), S97
International and Interstate Taxation (MPA), F94, S93, Sum91
Tax Issues in Business Entities I (MPA), S92, S91
Tax Issues in Business Entities II (MPA) F07, S07, S06, S05, F97, S95, S94, F93, F92, F89, S89, F88, S88, F87, S87, S85, F84, S84, F83
Controversial Tax Topics (MPA), Sum87, S85, F84, S84, F83
Advanced Tax Topics (MPA), F89, F88, F87
Advanced Tax Topics (BBA), S87, F86, S86, F85
Ph.D. student lyceum (UT), presenter, F92, F91, F90, F88, F87, F84,
Numerous Supervised Readings, 12 Professional Reports, and 1 Plan II Study

Universities other than The University of Texas

Graduate Seminar on International Tax Strategies: Global Structuring and Transfer Pricing, May 19, 2004 at INSEAD and, fall 2004 at ESCP School of Management, Paris, France

Graduate Seminar in International Financial Strategies: How International Finance and Accounting Affect Management Decisions, (Ph.D. and masters students) Feb.-June, 1996, Fundação Getúlio Vargas, São Paulo, Brazil

Introduction to Financial Accounting, ASU, 1979-81

Introduction to Taxation, ASU, 1981, SDSU, 1978-79

Advanced Taxation, SDSU, 1978-79

Awards received for teaching excellence (The University of Texas)

Outstanding DFW MBA Professor, Class of 2013, Fall 2013

MBA Applause Award, Spring 2011, Fall 2008 (given by Graduate Business Council)

CBA Foundation Advisory Council Award for Teaching Innovation, 2010 (co-recipient with Brian Lendecky)

The MPA Council Outstanding Professor Award, Fall 2007

Semi-Annual BBA Faculty Honor Roll, 2006

University Outstanding Service Learning Faculty, 2006

The CBA Foundation Advisory Council Award for Teaching Innovation, 2004

The MPA Council Outstanding Professor Award, Fall 1997

CBA Foundation Advisory Council Award for Teaching Innovation, 1987

CBA Foundation Advisory Council Award for Assistant Professors, 1986

State awards received for curriculum

2008 OneStar Foundation Governor's Volunteer Award for the Accounting Practicum course, Federal Taxation of Low Income Filers: Socio-Economic Forces

Award nominations for teaching excellence (The University of Texas)

MPA Council Outstanding Professor Award, Fall 1997

GBC-GSB Teaching Excellence Award, 1991

GBC-GSB Teaching Excellence Award, 1987

GBC-GSB Teaching Excellence Award, 1986

CBA Foundation Award for Assistant Professors, 1985

Junior Graduate Faculty Outstanding Teaching Award, 1984

Texas Excellence Teaching Award, 1983

Outstanding MBA Non-Core Teaching Award, 1982

Curriculum development and related activities

Faculty coordinator, Online Business Foundations Program. Development, launch and maintenance of a six course sequence of online business fundations courses under development by 18 faculty and in partnership with Deltak, an online program service provider. 2013 – present

Work started on transforming Introduction to Financial Accounting for two classes—the sophomore entry-level undergraduate course (ACC 311) and an MBA offering (BA 384T). These classes will be transformed from exclusively face-to-face offerings to hybrid ("flipped) courses (work undertaken from summer 2012-present)

After 25 years of teaching taxation, a self-directed learning program was undertaken in Financial Reporting and Financial Statement Analysis in preparation for permanently redirecting my professional focus. This self learning was first put to use teaching the MBA core financial reporting course in the fall of 2008.

Developed 20 hours of material on accounting for environmentally sustainable business. This material was delivered in the summer of 2007 in the summer 207 Accounting Department-CIBER summer abroad program in Hong Kong. There are no textbooks covering the content of this course. Therefore, all materials came from original source documents.

Significantly redesigned 3rd Year MPA Accounting Lyceum which was delivered for the first time in the fall of 2007. Innovations include a coordinated blend of career and program information, and the development of nontechnical attributes, such as professionalism. Unlike the former one semester-hour format, this will be undertaken in a two semester-credit-hour course.

Developed and delivered, in the spring of 2006, a UT service learning course that combined not-for-profit volunteer community service and the related social, economic, policy, and business issues in providing for low income individuals. The innovation in this course was introducing to students the wide-ranging non-business, as well as business, implications on society of the low income earners.

Developed and delivered, in 2004, a unique 12-hour module on global structuring and international transfer pricing.

Developed and delivered, in the fall of 2003, a unique course in tax planning and practice. The innovation in this course was the performance of real company projects by 4-5 member student teams.

Developed a unique course for international audiences concerning the impact of tax and commercial factors on financial strategies. This material was successfully delivered to masters and doctoral students at Fundação Getúlio Vargas, São Paulo, Brazil in the first semester or 1996.

Developed a strategic plan for the Department of Accounting, Finance and Control at Fundação Getúlio Vargas, São Paulo, Brazil. The plan will be implemented in 1997.

Moot Corp advisor to the team from Fundação Getúlio Vargas, São Paulo, Brazil, 1996.

Integrated the Scholes and Wolfson tax framework with the MBA tax course and the current academic tax literature in the Ph.D. Tax Seminar at The University of Texas at Austin, Fall 1990.

In conjunction with the 1990 reorganization of the UT tax curriculum, significant development was undertaken to teach in the completely reformulated graduate tax courses, most specifically Multijurisdictional (International and Interstate) Taxation and Taxation in the Formation of Business Entities I and II.

Stanford Summer Tax Conference, participant, July 1989.

Sole originator, administrator and implementer of microcomputer curriculum development in the MPA-tax program during the period in which the CBA was undergoing computerization in the mid-1980's. These efforts were acknowledged by receipt of a Project QUEST grant of 14 microcomputers and receipt of the CBA Foundation Advisory Council Award for Teaching Innovation in 1987.

Moot Corp advisor to "Liquid Piston Technologies, Inc." University of Texas, first place, 1986.

Executive education and professional presentations

Executive education was developed and delivered in “Financial Analysis and Measuring Business Performance” at the University of Texas at Austin—Dec 2013, May 2013, Dec 2012, May 2012, Dec 2011, May 2011, Dec. 2010, May 2010, Dec. 2009, May 2009

Executive education was developed and delivered in “Finance and Accounting for Non-Accountants” at the University of Texas at Austin in April of 2010

Designed curriculum and content under a UT Executive Education Program contract with Shell, 2006 - 2007.

“International Tax Strategies: Global Structuring and Transfer Pricing,” Paris, France, May 27-28, 2004 and November 26, 2004.

“International Income Tax and Optimal Financial Strategies: Implications for Bahia Sul,” São Paulo, Brazil, November 5, 1996

“International Income Tax and Optimal Financial Strategies: Implications for Souza Cruz S.A.,” Rio de Janiero, Brazil, September 13, 1996

"International Taxes and Management Decisions," Instituto Tecnologico y de Estudios Superiores de Monterrey, Monterrey, Mexico, October 13, 1994.

"Tax Curricula at the University of Texas at Austin," University of Texas presentation to faculty members from the Universidad Automoma de Nuevo Leon, Mexico, September 15, 1993.

"The New Proposed and Temporary Regulations Issued Under Section 482," University of Texas representative for an eight-hour educational panel presented to business executives and tax professionals. Sponsored by the Center for International Business Education and Research (CIBER):

April 13, 1993 (Dallas)
April 14, 1993 (Houston)

"Tax Implications of Trading Abroad," eight hour educational session presented to business executives and tax professionals. The Center for International Business Education and Research (CIBER) in conjunction with the USTA International Trade Center, the San Antonio World Trade Association, and the U.S. & Foreign Commercial Service, San Antonio Texas, January 21, 1993.

"Tax Implications of Trading Abroad," eight hour educational session presented to business executives and tax professionals. The Center for International Business Education and Research (CIBER) in conjunction with the U.S. Department of Commerce, Dallas World Trade Center, May 1992.

"Internationalizing Accounting Education," The Center for International Business Education and Research (CIBER), University of Texas at Austin, May 1991.

"Another Year, Another Law: In the Wake of the 1990 Tax Reform Act," six hour presentation, Management Development Program (MDP), University of Texas at Austin, Spring 1991.

"Individual and Partnership Taxation--A Review of Current Law," eight hour presentation, Management Development Program (MDP), University of Texas at Austin, Spring 1990.

"Partnership Taxation," Three days of professional education presented to Ernst & Young tax professionals, Ernst & Young National Tax Training Program, August 1989 (Washington D.C.)

"Partnership Taxation," Three days of professional education presented to Ernst & Whinney tax professionals, Ernst & Whinney National Tax Training Program:
August 1988 (Dallas)
August 1988 (Washington D.C.)

"Partnership Taxation--Current Law and Planning," two hour presentation, Management Development Program (MDP), University of Texas at Austin:
Spring 1988
Spring 1989

"Tax Simplification Goes Amuck," four hour presentation, Option II MBA Program, The University of Texas at Austin, Spring 1989.

"Tax Planning in the DMZ--Opportunities and Dangers," four hour presentation, Option II MBA Program, The University of Texas at Austin, Spring 1988.

"Tax Planning for Business Decisions," four hour presentation, Option II MBA Program, The University of Texas at Austin, Fall 1987.

"Emerging Trends in Real Estate Taxation," two hour presentation, Management Development Program (MDP), The University of Texas at Austin, Summer 1985.

"Tax Policy: Past, Present and Future," three hour presentation, Management Development Program (MDP), The University of Texas at Austin, October 1984.

"Microcomputer Analysis of Real Estate Investment," nine hour tax presentation, Management Development Program (MDP), The University of Texas at Austin:
Fall 1984
Spring 1985
Fall 1985
Spring 1986

"Tax Legislation: Policy and Practice," three hour presentation, Management Development Program (MDP), The University of Texas at Austin:
May 1984
October 1983

"Tax Planning in the Face of Uncertainty," National Accounting Association, invited dinner speaker, October 1983.

"Tax Planning in the 1980s," TACT workshop, The University of Texas at Austin, Spring 1983.

"A Tango with TEFRA," three hour presentation, Option II MBA Program, The University of Texas at Austin, Spring 1983.

Reports and book chapter

Southern Association of Colleges and Schools (SACS) reaccreditation reports and maintenance, 2006-present

AACSB—Accounting Accreditation Report was drafted and finalized, Fall 2010

The Business Foundation Program, College of Business Administration Business Foundation Committee, April 25, 1991 (J. Martin, chair; S. Limberg, vice-chair).

Revenue Raising Alternatives for the State of Texas (with R. Sommerfeld and R. Black), a report submitted to the Policy Advisory Committee for the State of Texas, June 17, 1987 (Pres. W. Cunningham, chair).

"Converting Ordinary Income Into Long-term Capital Gain Taxation," Chapter 7 in *Real Estate Investment Decisions: Taxation and Financial Analysis*, 1984 (R. Wyndelts, principal author).

Report of the ATA Committee on Academic Tax Research in Taxation, American Taxation Association Committee Report, Summer 1983 (C. Reese, chair).

Service

Outside Reviewer for Promotions/Hiring (school and year)

Outside letter

Marisa Agostini, Ph.D., New Castle University Business School entry-level applicant, required an assessment of research and letter of reference, 2012.

External service

Member, Deloitte University Relations External Academic Advisory Council Agreement, 2011-2013

Member, Management Leadership Group, Royal-Dutch Shell executive education program entitled Finance in Projects This activity involves custom designing a multi-course curriculum for Shell in concert with Shell subject matter experts, Queensland University of Technology (Brisbane Australia) and Cranfield School of Management (Cranfield, England). Feb 2006 – 2007.

Member, PwC Department Heads Consortium, 2002-2003.

Member, AAA Outstanding Educator Award Committee, 2002-2003.

Member, FSA Nominations Committee, 2002.

Member, PwC First Course in Accounting Task Force, 2002.

Member, Federation of Schools of Accountancy (FSA) Outstanding Faculty Award Committee, 2002.

Member, PwC Task Force on Employee Sourcing, 2001-2002.

Member, Big-5 Task Force on the First Course in Accounting Education, 2001-2002.

Board of Trustees, Accounting Programs Leadership Group (APLG), 1999-2002.

Member, Nominations Committee, Accounting Programs Leadership Group (APLG), 2000-2001

Accounting Advisor, AACSB Peer Review Team for NYU, 1998-99.

Member, Accounting Programs Leadership Group (APLG), 1998-01 AACSB Accreditation Committee (Cliff Skousen, chair).

Member, Accounting Programs Leadership Group (APLG), 1998 Program Committee (Linda Marquis, chair).

Member, Executive Committee, Department of Accounting, Finances and Control, Fundação Getúlio Vargas, São Paulo, Brazil, 1997

Trustee, American Taxation Association, 1996-97

Member, American Taxation Association 1994 Nominations Committee (J. Everett, chair).

Member, American Accounting Association 1992 Competitive Manuscript Award Committee (I. Solomon, chair).

Member, IRS Liaison Committee, 1991 (R. Orosco, chair).

Member, American Accounting Association 1991 Senior Faculty Consortium Committee (H. Gernon, chair).

Group Leader, American Accounting Association New Faculty Consortium, St. Charles, IL, Spring 1990, Spring 1991.

Member, American Taxation Association 1989 Committee on International Taxation (E. Outslay, chair).

Member, Arthur Young Tax Education Programs Task Force, 1987-88.

Chair, American Taxation Association 1988 Outstanding Academic Manuscript Award Committee.

Member, American Taxation Association 1987 Outstanding Manuscript Award Committee (R. Weber, chair).

Chair, American Taxation Association 1986 Committee on Computer Seminars.

Chair, American Taxation Association 1985 Annual Meeting Program Advisory Committee.

Member, American Accounting Association 1985 Annual Meeting Program Advisory Committee (J. Williams, chair).

Member, American Taxation Association 1985 Committee on Computer Seminars (R. Wyndelts, chair).

Member, American Taxation Association 1983 Committee on Doctoral Research (C. Reese, chair).

University service

Member, Jackson School of Geosciences Endowment Committee, 2013 - (Julia Gale, chair).

Member, Student Financial Services Committee, 2010-2012

Co-founder of the Institute of Fraud Studies and Acting Executive Director, 2002-2003

Hearing Panel Member, Faculty Grievance Committee, 1998-2000.

Member, Policy Advisory Committee for the State of Texas, 1986-87 (W. Cunningham, chair).

McCombs School of Business service

Faculty Coordinator, Online Business Foundations Program, 2013 - present

Member, BBA Online Business Foundations Program Committee, 2013 - present

Member, Department Undergraduate Committee – Accounting, 2013 - present

Member, IT Governance Committee and IT Administration Subcommittee, 2013-present

Associate, Rowling Hall Concept Design Review Committee, 2013 - present

Member, Global Certification Committee, 2013 - present

Member, MBA Working Professionals Curriculum Renewal Committee (2012-2013)

Member, Energy Management and Innovation Center, board, 2009-present

Advisory Committee, CIBER, 2003-2012 (Ray Brimble, chair), 1997-2002 (Robert Green, chair)

Member, Dean's Building Master Plan Committee, 2010

Member, Dean's D/PAC Preparation Committee, 2009

Member, College Operations Committee, 2008-present

Member, Dean's Strategic Planning Committee, 2008-09

Chair, MSB Staff Awards Committee, spring 2005

Member, MBA Scholarship Awards Committee, spring 2005

Associate Director for Research, CIBER, 2003-present

Member, CBA/GSB Marketing Task Force, 1999-2000.

Member, OGBD ad hoc Student Grievance Committee, 1998-99.

BA 102 Docent, mini-seminar presenter, Spring 1999.

Member, 1998 RAPID task force.

Change champion, 1998 RAPID task force, identifying key electives.

Member, GSB Diversity Committee, 1998 (Robert Duvic, chair)

GSB/CBA Globalization Strategic Plan author, 1997.

Member, CBA Research Award Committee, 1994 (R. McDaniel, chair).

Member, Executive Education Task Force, 1993-1994 (D. Jemison, chair).

Member, Graduate Business Program Committee, 1992 (D. Jemison, chair).

Member, Faculty Teaching Excellence Award Committee, 1992 (G. Jentz, chair).

Member, Business Foundations Program Advisory Committee, 1991-92 (F. Brandt, chair).

Member, Undergraduate Academic Programs Committee, 1988-92 (R. McDaniel, chair 1988-91; J. Martin, chair 1991-1992).

Vice-Chair, Business Foundations Program Committee, 1990-91 (J. Martin, chair).

Panelist, UT Undergraduate Business Council--fireside, Fall 1990.

Member, Associate/Assistant Professors Budget Advisory Committee, 1988 and 1989 (Dean R. Witt presiding)

Member, Financial Executives Research Foundation 1987 Coordinating Committee (J. Martin, chair).

Accounting Department service

Faculty Director, MPA Program, 2006 – present

Participant in a variety of departmental initiatives including, but not limited to, AACSB accreditation, SACs accreditation, departmental minority and international diversity initiatives, fund raising. curriculum design and staffing, GPA guidance and MPA electives initiatives, among others.

Chair, MPA Program Committee, fall 2010– present

Chair, MPA tax track curriculum committee, fall 2005-spring 2006

Chair, Departmental of Accounting, 1997-2003.

Member, Departmental Executive Committee, 2004-2006 (Ross Jennings Chair)
Director, Eco Path to the MPA program, 2001-2003
Director, MPA Alternate Entry Program, 2000-2002
Director, MPA Programs, 1999-2000.
Tax-track Advisor, 1998-2000.
Director, PwC Summer Academy, 1998, 1999.
Chair, Departmental Review Committee for Research on Human Subjects, 1993-1995.
Chair, Faculty Recruiting Committee, 1993-94.
Chair, Ad Hoc Committee to Evaluate MPA, 1992-93.
Chair, Faculty Recruiting Committee, 1991-92.
Chair, Ph.D. Evaluation and Continuance Committee, 1989-91.
Chair, Ph.D. Admissions Committee, 1987-1989.
Chair, Tax Program Coordinating Committee, 1985.
Liaison, Department of Accounting Advisory Council, 1985-87.
Member, PhD student admissions committee, 2004-2005 (Lisa Koonce, Chair)
Member, Departmental Executive Committee, 1993-95 (D.P. Newman, chair).
Member, Faculty Recruiting Committee, 1992-93, 1994-96 (D.P. Newman, chair), 1997-2001 (S.T. Limberg, chair).
Member, Department of Accounting Governance Formulation Committee, Spring 1988 (R. May and R. Sommerfeld, co-chairs).
Member, Department of Accounting Teaching and Research Awards Nominating Committee, Spring 1988 (D. Short, chair).
Member, Ph.D. Admissions Committee, 1986-87 (E. Summers, chair).
Member, Faculty Recruiting Committee, 1986-87 (R. May, chair).
Member, Ph.D. Curriculum Planning Committee, 1984-85 (E. Deakin, chair).
Member, Ph.D. Comprehensive Examination Committee in Taxation, 1982-84.

Certifications and professional memberships

Certified Public Accountant, California, granted 1978, reactivated 2009-present
American Accounting Association
American Taxation Association
National Tax Association - Tax Institute of America
American Institute of C.P.A.s
California Society of C.P.A.s
NAA Board of Directors, San Diego, California, 1977