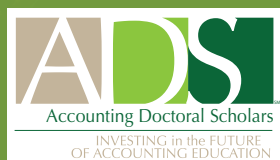




# Accounting Doctoral Scholars Program

2017–2018 Annual review and impact report





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# Letter from AICPA Foundation leadership

Created in 2009, the Accounting Doctoral Scholars (ADS) Program continues to be a much-needed pathway in the accounting profession. By addressing the shortage of audit and tax faculty, the program is helping to future-proof the CPA credential. The future of the profession requires the attraction, development and retention of the nation's top talent.

Increasing the number of faculty who can provide a meaningful accounting education experience is one way to help. While ADS is not the only solution to bring more qualified faculty with practical experience into the classroom, it does represent the largest investment ever made by the accounting profession to advance accounting education.

That investment has had a significant impact.

The ADS Program has recruited and funded 132 candidates with relevant experience as practitioners. An additional 12 candidates will be joining ADS this fall, and we are proud to have 52 universities participating in the program. With so many ADS graduates now working at colleges and universities across the country, we wanted to examine the impact of ADS scholars in the classroom.

In a recent survey that was sent to all ADS participants, we found that 44 ADS scholars came from a tax concentration, and 88 came from audit. Combined, these candidates have produced over 138 publications and taught 828 classes, reaching more than 31,000 students. By all accounts, these new faculty members are high-caliber, talented individuals who are a significant part of the solution for sustaining a vibrant accounting profession.

We are very appreciative of the many people and organizations who have contributed so willingly to this undertaking. We extend a heartfelt "thank you" to all of them, including our financial sponsors with the insight to contribute to this profession-wide effort, the participating universities that have nurtured the ADS scholars through their doctoral programs, and the CPAs who have made many sacrifices in pursuit of their Ph.D.

We also want to recognize the past support of the ADS Program by the American Institute of CPAs (AICPA) and the Center for Audit Quality (CAQ), and more importantly, their ongoing annual support of the new phase of the ADS Program.

As the program approaches its 10th year, ADS is committed to furthering its mission to strengthen accounting education. The future of the profession depends on accounting students, and ADS ensures that accounting faculty are prepared to teach, encourage and inspire the next generation of CPAs.

With your help, we are making a difference in accounting education, and we are proud to share the success of ADS with you.



**Ernie Almonte, CPA/CFF/CITP, CFE**  
President, AICPA Foundation



# Remembering Bill Ezzell

1949–2018

AICPA Chairman, 2002–03

AICPA Foundation President, 2006–09

It is with great sadness and a heavy heart that the Accounting Doctoral Scholars Program announces the passing of our founder, William F. (Bill) Ezzell.

Throughout his career at Deloitte as the National Managing Partner for Legislative and Regulatory Relations — and after his retirement — Bill devoted an extraordinary amount of time to advancing the profession.

A former chairman of the AICPA Board of Directors, past president of its Foundation Board and recipient of the AICPA's 2009 Gold Medal Award for Distinguished Service, Bill and his achievements are intricately embedded into the profession's history and evolution. In 2011, the American Accounting Association also recognized Bill with its Outstanding Service Award.

From his work on establishing The Accountants Coalition and implementing the Pathways Commission recommendations, to spearheading the Accounting Doctoral Scholars programs that raised \$17 million to increase the number of Ph.D. graduates in audit and tax, and weighing in on and helping to shape the strategic direction of accounting, Bill's impact leaves a lasting and significant legacy.

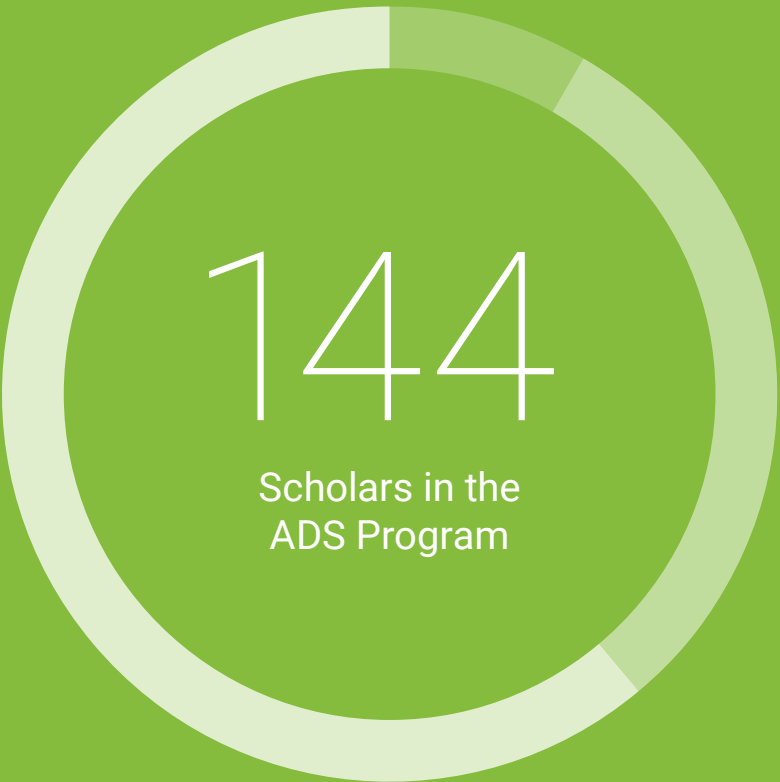
Bill was a fierce advocate for the CPA profession, especially for students on the pathway toward becoming a CPA and the educators who teach them. We will all miss his leadership, his expansive spirit and gentle humor, as well as his deep and ceaseless commitment to enhancing the value, relevance and impact of the accounting profession.

His steadfast support of CPAs pursuing a career in academia is unparalleled in the accounting profession.

**Steve Matzke**

Director — Faculty & University Initiatives  
Accounting Doctoral Scholars Program

# The impact of Accounting Doctoral Scholars



Preparing to  
start classes



Scholars  
specializing in tax



Scholars  
specializing in audit

31,000+ students reached



828+

classes taught by scholars



138+

publications by scholars

\* 81 total survey responses received





"The ADS Program is truly an incredible initiative. It set me up for success early on as a Ph.D. student by introducing me to a network of accomplished and aspiring academics; those individuals have become some of my closest colleagues. Additionally, the overall profession continues to recognize the ADS Program as a critical bridge between academia and practice, and my association with the program continues to open doors for me as a junior faculty member."

**Sean Dennis, CPA, Ph.D.**

Assistant Professor, University of Wisconsin  
ADS 2010 Cohort



"I am extremely grateful for the ADS Program. It changed the trajectory of my life, and I'll always be thankful for the opportunities it provided. I'm proud to be part of the network of ADS scholars, many of whom I consider close friends."

**Mary Durkin, CPA, Ph.D.**

Assistant Professor, University of San Diego  
ADS 2011 Cohort



"Applying to the ADS Program is one of the better decisions I have made in my life. The financial support was of course valuable, and made the transition from public accounting to academia easier. But the support network that came with it was what made the program truly invaluable. It has opened doors and opportunities that I'm sure would not have been available to me otherwise."

**Nathan Cannon, CPA, Ph.D.**

Assistant Professor, Texas State University  
ADS 2009 Cohort



## Mission, objectives and goal

### Mission

The mission of the Accounting Doctoral Scholars Program, and of its sponsors, is to increase the pool of academically qualified accounting faculty in audit and tax, with recent experience, at U.S. universities that provide talent to the public accounting profession.

### Objectives

To achieve its mission, the ADS Program seeks to increase the supply of qualified candidates to accounting doctoral programs, and to increase the capacity of universities to accept additional students into doctoral study in audit and tax by:

- Encouraging practitioners with recent public accounting experience in audit or tax to obtain their doctorate and become a university faculty member
- Providing financial support to selected qualified candidates while they pursue a doctorate in accounting
- Encouraging universities to increase doctoral enrollments in auditing and tax but not at the expense of existing funded slots
- Improving the preparation of accounting students for a career in accounting through the infusion of talent from the profession into the classroom

### Goal

The goal of the Accounting Doctoral Scholars Program is to place individuals with recent professional accounting experience in auditing and tax into accounting doctoral programs at participating universities.

"I am grateful to the ADS Program, not only for the funding while attending my Ph.D. program, but also for helping legitimize me as a candidate to both Ph.D. programs and academic jobs following my Ph.D. program."

Cass Hausserman, CPA, Ph.D.  
Assistant Professor  
Portland State University  
ADS Cohort 2010



# Program origins and development

The Accounting Doctoral Scholars Program was developed in 2008 from a series of AACSB International and the American Accounting Association-sponsored reports identifying a significant and growing shortage of accounting doctoral faculty.

Demographic data of faculty at the time indicated a significant increase in faculty retirements in the next decade, leading to an even greater future shortage of academically qualified accounting faculty.

In response to these findings, Bill Ezzell, president of the AICPA Foundation at that time, established an ad hoc advisory committee to help identify how to address the growing threat to the supply of future talent to the public accounting profession.

Following up on the work of the ad hoc advisory committee, representatives of the major accounting firms began discussing possible steps to address the looming crisis.

Drawing on feedback from doctoral granting programs, two challenges were identified for the profession to undertake. First, the universities identified the lack of sufficient funding as a handicap for increasing assistantship slots for doctoral students. Second, there was not a sufficient pool of quality applicants pursuing doctoral studies.

The major accounting firms responded by agreeing to commit funding toward increasing doctoral-assistantship slots. They also pledged assistance in providing information on the ADS Program to their employees. Planned efforts focused on the shortage of doctoral accounting faculty in the tax and audit concentrations, which data showed was greatest.

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“The ADS Program was and continues to be a significant resource, not only in terms of networking, but also by maintaining a tie to the profession. This is helpful for both research and teaching efforts.”

**Kelli Saunders, CPA, Ph.D.**

Assistant Professor, University of Nebraska–Lincoln  
ADS 2010 Cohort

Under Ezzell’s leadership, the Foundation contacted 80 of the largest accounting firms to commit funding to help increase accounting doctoral assistantships and assist in recruiting doctorate applicants from their ranks. State CPA societies were also approached for financial commitment and to promote the program to their membership.

An advisory council was organized once funding was committed, and the decision was made to administer the program through the AICPA Foundation. The program became known as the Accounting Doctoral Scholars Program.

# Participating universities

The availability of accounting doctoral programs at universities with the capacity to enroll doctoral students with a focus in audit or tax is critical to the success of the ADS Program. The Advisory Council used data to screen schools to be invited to partner with the ADS Program. Priority was given to universities with a track record of placing doctoral graduates at schools that produce the major proportion of the talent in audit and tax for the public accounting profession. Recently established programs or restructured programs were given the opportunity to make the case that their programs have the potential for their future doctoral graduates to gain such placement. All applications were screened for faculty strength in audit and tax.

Each university was required to document that enrolled ADS Program Scholars were incremental enrollments and not replacements in currently funded slots. The most common reason for universities not being able to participate in the final year of the program was the lack of faculty resources to direct incremental enrollments in tax or audit.

51 participating universities over the life of the program

## All ADS participating universities over the life of the program

|                                 |  |  |
|---------------------------------|--|--|
| Arizona State University        | Texas A&M University                       | University of Mississippi                |
| Baruch College/CUNY             | Texas Tech University                      | University of Missouri-Columbia          |
| Bentley University              | University of Alabama                      | University of Nebraska                   |
| Case Western Reserve University | University of Arizona                      | University of North Carolina-Chapel Hill |
| Cornell                         | University of Arkansas                     | University of North Texas                |
| Drexel University               | University of Colorado                     | University of Oklahoma                   |
| Emory University                | University of Connecticut                  | University of Oregon                     |
| Florida State University        | University of Florida                      | University of Pittsburgh                 |
| Indiana University              | University of Georgia                      | University of South Carolina             |
| Louisiana State University      | University of Hawaii at Manoa              | University of Southern California        |
| Michigan State University       | University of Houston                      | University of Tennessee-Knoxville        |
| Morgan State University         | University of Illinois-Chicago             | University of Texas-San Antonio          |
| Ohio State University           | University of Illinois at Urbana-Champaign | University of Texas-Austin               |
| Oklahoma State University       | University of Iowa                         | University of Utah                       |
| Rutgers University              | University of Kansas                       | University of Washington                 |
| Syracuse University             | University of Kentucky                     | University of Wisconsin-Madison          |
| Temple University               | University of Massachusetts-Amherst        | Virginia Tech                            |







# Applications and selection of candidates

The selection of ADS Program Scholars is a two-step process.



**First**, a selection committee reviews applications to identify applicants with the highest likelihood of gaining admission to one or more doctoral programs at the participating universities.



**Second**, following the ADS Orientation Conference, candidates are asked to affirm their commitment to move forward in the application process. This year's ADS Program scholars were all selected from this group of candidates.

## Eligibility

To be eligible for the program, the candidate must meet the following requirements:

- CPA licensure
- A minimum three years of professional accounting experience, with a portion of that experience being within the last three years at the time of enrollment
- Status as U.S. citizen or permanent resident (green card holder)
- Undergraduate and/or master's degree in accounting
- GMAT score of 650 or higher (must be taken in last five years)
- Commitment to apply and gain acceptance to an ADS-participating university to pursue a Ph.D. degree in accounting with a concentration in audit or tax
- Intent to teach and research, in audit or tax, at a U.S. AACSB-accredited university upon graduation

"The ADS Program eased the transition from practice to academia and set me up for success in my time in the PhD program at the University of Wisconsin-Madison. The ADS Program allowed me to move from a great career to my calling, for which I am forever grateful."

**Patrick J. Hurley, CPA, Ph.D.**

Assistant Professor, Northeastern University  
ADS 2010 Cohort



## ADS website

The ADS Program website continues to be a valuable asset for communicating with prospective candidates and informing them of the nature of doctoral accounting programs and what to expect as a faculty member.

To date, over 210,000 visitors have logged on to [adsphd.org](http://adsphd.org) since the website's 2008 launch. In 2016, the website was refreshed. The site has evolved into a multifunctional platform providing detailed ADS Program information, including an online application process, links to participating universities and FAQs.

### Contact Information

#### Steve Matzke

Director — Faculty & University Initiatives  
Accounting Doctoral Scholars Program

#### AICPA Foundation

220 Leigh Farm Road  
Durham, NC 27707  
919.402.4682

[adsphd.org](http://adsphd.org) | [ADSProgram@aicpa.org](mailto:ADSProgram@aicpa.org)

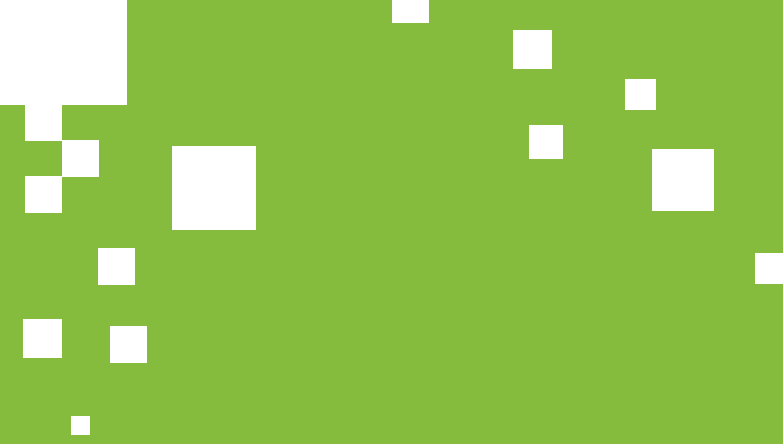


# Appendix I: Student directory

| Scholar                       | Employer                            | Cohort | Email address                       | University attended                     |
|-------------------------------|-------------------------------------|--------|-------------------------------------|---|
| Thomas Adams                  | University of Connecticut           | 2011   | thomas.adams_iii@uconn.edu          | Temple University                       |
| Jaehan Ahn                    | Northeastern University             | 2012   | j.ahn@northeastern.edu              | University of Oklahoma                  |
| Amber Alfano                  | ABD Tax Accounting LLC              | 2012   | amber.alfano@colorado.edu           | University of Colorado                  |
| Elizabeth Altiero (Poziemski) | University of Central Florida       | 2009   | Elizabeth.Pozziemski@ucf.edu        | University of Illinois-Urbana Champaign |
| Chelsea Rae Austin            | University of South Carolina        | 2009   | chelsearae.austin@moore.sc.edu      | University of Iowa                      |
| Ashley Austin                 | University of Richmond              | 2011   | aaustin@richmond.edu                | University of Georgia                   |
| Kathleen Bakarich             | Hofstra University                  | 2012   | Kathleen.Bakarich@hofstra.edu       | Baruch CUNY                             |
| Michael Barnes                | Truman State University             | 2010   | mbarnes@truman.edu                  | Oklahoma State University               |
| Felicity (Jane) Barton        | Baruch College                      | 2010   | FelicityJane.Barton@baruch.cuny.edu | Indiana University                      |
| Erik Beardsley                | University of Notre Dame            | 2012   | ebeardsl@ND.EDU                     | Texas A&M                               |
| Matthew Beck                  | Michigan State University           | 2010   | beckm@broad.msu.edu                 | University of Missouri                  |
| Nathan Berglund               | Mississippi State University        | 2011   | nb965@msstate.edu                   | Oklahoma State University               |
| Jonathan Black                | Purdue University                   | 2010   | black100@purdue.edu                 | University of Colorado                  |
| Erik Boyle                    | University of Cincinnati            | 2010   | boyleek@ucmail.uc.edu               | University of Utah                      |
| William Brink                 | Miami University                    | 2010   | brinkwd@miamioh.edu                 | University of South Carolina            |
| Anthony Bucaro                | Case Western Reserve                | 2010   | bucaro2@illinois.edu                | University of Illinois                  |
| Nathan Cannon                 | Texas State University              | 2009   | cannon@txstate.edu                  | Bentley University                      |
| Heather Carrasco              | Texas Tech                          | 2012   | heather.carrasco@ttu.edu            | University of Alabama                   |
| Shannon Chen                  | University of Arizona               | 2012   | shannonchen@email.arizona.edu       | University of Texas                     |
| Jierong (Julia) Cheng (Zhang) | New York City College of Technology | 2012   | Jzhang@citytech.cuny.edu            | Rutgers University                      |
| Emily Cokeley                 | Rochester Institute of Technology   | 2011   | ecokeley@saunders.rit.edu           | Syracuse University                     |
| Beth Collier-Vermeer          | University of Delaware              | 2010   | bvermeer@udel.edu                   | Drexel University                       |
| Eric Condie                   | Georgia Institute of Technology     | 2012   | eric.condie@scheller.gatech.edu     | University of Wisconsin                 |
| Megan Cosgrove                | George Mason University             | 2009   | mcosgro3@gmu.edu                    | University of Alabama                   |
| Lauren Cunningham (Dreher)    | University of Tennessee             | 2010   | lcunningham@utk.edu                 | University of Arkansas                  |
| Keith Czerney                 | University of Nebraska              | 2010   | kczerney2@unl.edu                   | University of Illinois                  |
| Paul Demere                   | University of Georgia               | 2012   | pauldemere@uga.edu                  | University of Illinois-Urbana Champaign |
| Sean Dennis                   | University of Kentucky              | 2010   | sean.dennis@uky.edu                 | University of Wisconsin-Madison         |
| Mary Kate Dodgson (Meehan)    | Northeastern University             | 2012   | m.dodgson@northeastern.edu          | University of Massachusetts             |
| Ashley Douglass               | Trinity University                  | 2012   | adougla1@trinity.edu                | University of Arkansas                  |
| Marcus Doxey                  | University of Alabama               | 2009   | mmdoxey@culverhouse.ua.edu          | University of Kentucky                  |
| Ryan Dunn                     |                                     | 2012   | rtarg4@mail.missouri.edu            | University of Missouri                  |
| Mary Durkin (Parlee)          | University of San Diego             | 2011   | mdurkin@SanDiego.edu                | Bentley University                      |
| Matthew Ege                   | Texas A&M University                | 2009   | mege@mays.tamu.edu                  | University of Texas                     |
| Anne Ehinger                  |                                     | 2010   | aehinger@uga.edu                    | Arizona State University                |
| Elizabeth Emeigh (Fuerherm)   | Goldman Sachs-Vice President        | 2012   |                                     | University of Kansas                    |
| Pamela Engelberg (Kuperstein) | Temple University                   | 2010   | pamela.kuperstein@temple.edu        | Temple University                       |
| Kathryn Enget                 | University at Albany-SUNY           | 2010   | kenget@albany.edu                   | Virginia Polytechnic Institute          |
| Matthew Erickson              | Virginia Tech                       | 2012   | matthewe@vt.edu                     | University of Arizona                   |
| Cassandra Estep               | Emory University                    | 2011   | cestep@emory.edu                    | University of Illinois-Urbana Champaign |

| Scholar                   | Employer                              | Cohort | Email address                      | University attended                        |
|---------------------------|---------------------------------------|--------|------------------------------------|--|
| Andrew Finley             | Claremont McKenna College             | 2011   | andrew.finley@cmc.edu              | University of Arizona                      |
| Michele Frank             | Miami University (Ohio)               | 2009   | frankm@miamioh.edu                 | University of Pittsburgh                   |
| Aaron Fritz               | Michigan State University             | 2016   | fritzaar@broad.msu.edu             | Michigan State University                  |
| Joanna Garcia             | University of Waterloo                | 2010   | jlgarcia@uwaterloo.ca              | Virginia Polytechnic Institute             |
| Amanda Gates Carlson      | University of Wisconsin               | 2016   | agcarlson@wisc.edu                 | University of Georgia                      |
| Davidson Gillette         | University of Alabama                 | 2016   | dbgillette@crimson.ua.edu          | University of Alabama                      |
| Nicholas Hallman          | University of Texas                   | 2012   | nicholas.hallman@mcombs.utexas.edu | University of Missouri                     |
| Denise Hanes Downey       | Villanova                             | 2009   | denise.downey@villanova.edu        | Bentley University                         |
| Cass Hausserman           | Portland State University             | 2010   | cass.hausserman@pdx.edu            | University of Wisconsin - Madison          |
| Erin Henry                | University of Memphis                 | 2009   | erin.henry@memphis.edu             | University of Connecticut                  |
| Bradford Hepfer           | Texas A&M University                  | 2010   | bhepfer@mays.tamu.edu              | University of Iowa                         |
| Sean Hillison             | Virginia Tech                         | 2011   | shillis@vt.edu                     | University of Illinois                     |
| Margot Howard             | College of William and Mary           | 2010   | margot.howard@mason.wm.edu         | University of North Carolina               |
| Patrick Hurley            | Northeastern University               | 2010   | p.hurley@northeastern.edu          | University of Wisconsin - Madison          |
| Michelle Hutchens (Moore) | University of Illinois                | 2011   | mlh80@illinois.edu                 | Indiana University                         |
| Andrew Imdieke            | University of Notre Dame              | 2011   | aimdieke@ND.EDU                    | Michigan State University                  |
| Alex Johannis             | University of Illinois                | 2016   | ajj2@illinois.edu                  | University of Illinois                     |
| Brett Kawada              | San Diego State University            | 2009   | bkawada@mail.sdsu.edu              | University of Missouri                     |
| Elena Klevsky             | University of New Mexico              | 2011   | eklevsky@unm.edu                   | University of Illinois at Urbana-Champaign |
| Phillip Lamoreaux         | Arizona State University              | 2009   | Phillip.Lamoreaux@asu.edu          | University of Arizona                      |
| John Lauck                | Louisiana Technical University        | 2011   | lauckjr@latech.edu                 | Virginia Tech                              |
| Elisa Lee                 | California State University Fullerton | 2010   | ellee@fullerton.edu                | University of Massachusetts                |
| Dongliang (Ken) Lei       | California State University East Bay  | 2010   | Dongliang.Lei@csueastbay.edu       | Baruch College                             |
| Christina Lewellen        | North Carolina State University       | 2012   | cmlowell@ncsu.edu                  | Florida State University                   |
| Dong (Andrew) Li          | University of North Dakota            | 2011   | dong.li.2@UND.edu                  | Louisiana State University                 |
| Pablo Machado             | San Diego State University            | 2011   | pmachado@sdsu.edu                  | University of Arizona                      |
| Amy Madrack (Lysak)       | Rowan University                      | 2012   | lysak@rowan.edu                    | Rutgers University                         |
| Steven Maex               | Arizona State University              | 2016   | steven.maex@temple.edu             | Temple University                          |
| Eldar Maksymov            | Cornell University                    | 2009   | Eldar.Maksymov@asu.edu             | Cornell University                         |
| Aaron Mandell             | University of Wisconsin - Milwaukee   | 2011   | amandell@uwm.edu                   | University of Oregon                       |
| Adam Manlove              | Indiana University                    | 2016   | amanlove@iu.edu                    | Indiana University                         |
| Norman Massel             | Louisiana State University            | 2009   | nmassel@lsu.edu                    | University of Connecticut                  |
| Michelle McAllister       | Northeastern University               | 2012   | m.mcallister@northeastern.edu      | Florida State University                   |
| Lindsay Metcalfe-Andiola  | Virginia Commonwealth University      | 2011   | lmandiola@vcu.edu                  | Bentley University                         |
| Robert Mocadlo            | University of North Dakota            | 2011   | robert.mocadlo@UND.edu             | Emory University                           |
| Landi Morris              | Bentley University                    | 2016   | landimorris12@gmail.com            | Bentley University                         |
| Michael Mowchan           | American University                   | 2011   | mowchan@american.edu               | Arizona State University                   |
| Curtis Mullis             | Georgia State University              | 2011   | cmullis3@gsu.edu                   | University of Alabama                      |
| Marc Neri                 | Texas Christian University            | 2012   | marc.neri@tcu.edu                  | University of North Texas                  |
| Kara Obermire             | Oregon State University               | 2011   | kara.obermire@oregonstate.edu      | University of Wisconsin                    |

| Scholar                    | Employer                                | Cohort | Email address                    | University attended          |
|----------------------------|---|--------|----------------------------------|------------------------------|
| Adam Olson                 | Utah State University                   | 2011   | adam.olson@usu.edu               | Texas A&M University         |
| Josette Pelzer             | College of Charleston                   | 2011   | pelzerj@cofc.edu                 | Florida State University     |
| Anne Podany (Albrecht)     | Texas Christian University              | 2012   | a.albrecht@tcu.edu               | University of Missouri       |
| Kathleen Powers            | University of Tennessee                 | 2011   | kathleen.powers@utk.edu          | University of Texas-Austin   |
| Jaclyn Prentice            | Oklahoma State University               | 2012   | jaclyn.prentice@okstate.edu      | University of Arkansas       |
| Jonathan Pyzoha            | Miami University (Ohio)                 | 2009   | pyzohajs@miamioh.edu             | Virginia Tech                |
| Iguehi Rajsky              | Temple University                       | 2016   | iguehi.rajsky@temple.edu         | Temple University            |
| Tammie Rech (Schaefer)     | University of Missouri-Kansas City      | 2009   | schaefertj@umkc.edu              | University of South Carolina |
| Michael Ricci              | University of Florida                   | 2012   | michael.ricci@warrington.ufl.edu | University of Georgia        |
| Miles Romney               | Florida State University                | 2011   | mrromney@business.fsu.edu        | Michigan State University    |
| Stephen Rowe               | University of Arkansas                  | 2009   | sprowe@uark.edu                  | University of Illinois       |
| Aaron Saiewitz             | University of Nevada, Las Vegas         | 2009   | aaron.saiewitz@unlv.edu          | University of Massachusetts  |
| Kristen (Kelli) Saunders   | University of Nebraska-Lincoln          | 2010   | kelli.saunders@unl.edu           | University of South Carolina |
| Steven Savoy               | University of Illinois at Chicago       | 2011   | ssavoy@uic.edu                   | University of Iowa           |
| Timothy Seidel             | Brigham Young University                | 2010   | timseidel@byu.edu                | University of Arkansas       |
| Emily Semrau (Griffith)    | University of Wisconsin                 | 2009   | egriffith@bus.wisc.edu           | University of Georgia        |
| Mark Sheldon               | John Carroll University                 | 2012   | msheldon@jcu.edu                 | Virginia Tech                |
| Amy Sheneman               | The Ohio State University               | 2012   | sheneman.2@osu.edu               | Indiana University           |
| Matthew Sherwood           | University of Massachusetts             | 2011   | msherwood@isenberg.umass.edu     | University of Kansas         |
| Michelle Shimek (Nessa)    | Michigan State University               | 2009   | nessamic@msu.edu                 | University of Iowa           |
| R. William Snyder          | University of Illinois                  | 2012   | rsnyder4@illinois.edu            | University of Illinois       |
| Zhiyan (Jane) Song         | University of Georgia                   | 2012   | jsong@wustl.edu                  | University of Iowa           |
| Kristen Steury             | University of South Carolina            | 2016   | kristen.steury@grad.moore.sc.edu | University of South Carolina |
| Bryan Stewart              | Brigham Young University                | 2009   | bstewart@byu.edu                 | University of South Carolina |
| Shane Stinson              | University of Alabama                   | 2010   | srstinson@culverhouse.ua.edu     | Texas Tech                   |
| Bridget Stomberg           | University of Georgia                   | 2009   | stomberg@uga.edu                 | University of Texas          |
| Lisa Stripling (De Simone) | Stanford Business School                | 2009   | LNDS@Stanford.Edu                | University of Texas          |
| Brandon Szerwo             | State University of New York at Buffalo | 2012   | bszerwo@buffalo.edu              | University of Washington     |
| Amy Tegeler                | University of Wisconsin-Milwaukee       | 2012   | tegelera@uwm.edu                 | University of Wisconsin      |
| Edward Thomas              | University of Alabama at Birmingham     | 2012   | edward.thomas@warrington.ufl.edu | University of Florida        |
| Neal VandenBerg            | Grand Valley State University           | 2010   | vandneal@gvsu.edu                | Temple University            |
| Kelly Wentland             | George Mason University                 | 2011   | kwentlan@gmu.edu                 | University of North Carolina |
| Brian Wenzel               | McGill University                       | 2012   | brian.wenzel@mcgill.ca           | Arizona State University     |
| Aubrey Whitfield           | University of Massachusetts             | 2016   | awhitfield@umass.edu             | University of Massachusetts  |
| Devin Williams             | University of Illinois                  | 2011   | devinw@illinois.edu              | University of Florida        |
| John (Dave) Witesman       | Utah Valley University                  | 2012   | DaveW@uvu.edu                    | Syracuse University          |
| Alfred Yebba               | Binghamton University-SUNY              | 2010   | aayebba@binghamton.edu           | Syracuse University          |
| Yuepin (Daniel) Zhou       | University of Illinois                  | 2012   | zhou121@illinois.edu             | Emory University             |



“The ADS Program is truly an incredible initiative. It set me up for success early on as a Ph.D. student by introducing me to a network of accomplished and aspiring academics; those individuals have become some of my closest colleagues. Additionally, the overall profession continues to recognize the ADS Program as a critical bridge between academia and practice, and my association with the program continues to open doors for me as a junior faculty member.”

**Lindsay Andiola, CPA, Ph.D.**

Assistant Professor, Virginia Commonwealth University  
ADS cohort 2011

# Appendix II: ADS Program Orientation Conference

Nov. 3–4, 2017

Sheraton Chicago O'Hare Airport Hotel  
Chicago, IL

## Friday, Nov. 3

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### Meeting of Participating University Representatives with ADS Program Staff

Representatives of the participating universities will meet with the ADS Program staff for a discussion of the admission-decision process and timelines and to provide feedback and advice on operational aspects of the Program.

### Meeting of Participating University Representatives with ADS Program Staff

## Saturday, Nov. 4

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### Breakfast

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### Welcome, Introductions, and ADS Program Overview

Steve Matzke, ADS Program Director

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### Feedback from the Trenches

This session will offer perspectives on life as a doctoral student and as a newly minted faculty member and a recent Ph.D. graduate. The presenters will share their experiences to date and will offer practical suggestions for achieving success and overcoming obstacles.

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### Break

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### Life as a Doctoral Student—Faculty Perspectives

This session will explore what to expect as an accounting doctoral student. The typical doctoral program curriculum will be described, including expectations of specific knowledge sets, e.g., quantitative and other research skills. Students' roles as research assistants will be explored.

Dr. Matthew Beck, Ph.D., CPA — Assistant Professor, Michigan State University

Dr. Nicholas Hallman, Ph.D., CPA — Assistant Professor, University of Texas-Austin

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Saturday, Nov. 4

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**Life as a Doctoral Student — Faculty Perspectives**

This session will explore what to expect during the life cycle of a faculty member — the rewards and challenges during the various phases of academic life from the first year, to achieving tenure, and to being a senior scholar. The expectations for research, teaching and service will be explored. Challenges of balancing family life will also be addressed.

Dr. Reza Barkhi, Ph.D. — KPMG Professor and Director of Ph.D. Program, Virginia Tech

Dr. Yvonne Hinson, Ph.D., CPA, CGMA — AICPA Academic-in-Residence

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**Lunch**

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**Insights on Identifying Viable Research Topics and Securing Research Grants**

This session will offer perspectives on identifying viable research topics in tax and auditing, including examples of topics that may be relevant to contemporary professional issues. Each panelist will describe the process for selecting appropriate topics for securing research grants in their respective fields. Additional factors relevant to securing research funding support in tax and auditing will also be described.

Margot Cella — Executive Director of Research, Center for Audit Quality

Dr. Stacie Laplante, Ph.D. — Associate Professor, University of Wisconsin

Dr. Linda A. Myers, Ph.D. — Professor and Director of the Ph.D. Program, University of Tennessee

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**Secrets of a Successful Applicant**

This session will explore how Ph.D. programs view the “ideal” candidate; how admissions committees assess applicants on several important dimensions and gain important insights on how the successful applicant approaches each component of the application. Information will also be shared about how to select schools that will be the best fit for you.

Dr. Jagan (Krish) Krishnan, Ph.D. — Professor & Merves Senior Research Fellow, Temple University

Dr. George W. Krull, Jr., CPA, CGMA, Ph.D. — Professor of Accounting, Oklahoma State University

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**University Fair**

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# Program sponsors

The ADS Program sponsors have remained steadfast in their support of the ADS Program despite a continuing difficult economic climate. As an example of continuing support, when sponsoring firms have merged, the new entity has continued commitments each firm made separately prior to the merger. As of

May 2017, 120 sponsors were committed to support the ADS Program. The sponsors include the AICPA, 68 accounting firms, 49 CPA state societies and four other organizations. These organizations have committed more than \$17 million to the ADS Program.

## Sponsoring Firms\*

Anchin, Block, & Anchin LLP

Anton Collins Mitchell LLP

Aronson & Co.

Baker Tilly International:

Amper, Politziner & Mattia PC

Baker, Newman & Noyes LLC

Baker Tilly Virchow Krause LLP

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BDO Seidman LLP

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Brady, Martz & Associates PC

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Hawkins, Ash, Baptie & Company LLP

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Singer Lewak LLP

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Warren, Averett, Kimbrough & Marino LLC

Wipfli LLP

WithumSmith+Brown

\*Several original sponsoring organizations have merged since the inception of the program.

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### CPA Professional Membership Organizations\*

American Institute of CPAs

Alabama Society of CPAs

Arizona Society of CPAs

Arkansas Society of CPAs

California Society of CPAs

Colorado Society of CPAs

Connecticut Society of CPAs

Delaware Society of CPAs

Florida Institute of CPAs

Georgia Society of CPAs

Hawaii Society of CPAs

Idaho Society of CPAs

Illinois CPA Society/CPA Endowment  
Fund of Illinois

Indiana CPA Society

Iowa Society of CPAs

Kansas Society of CPAs

Kentucky Society of CPAs

Louisiana Society of CPAs

Maine Society of CPAs

Maryland Association of CPAs

Massachusetts Society of CPAs

Michigan Association of CPAs

Minnesota Society of CPAs

Mississippi Society of CPAs

Missouri Society of CPAs

Montana Society of CPAs

Nevada Society of CPAs

New Hampshire Society of CPAs

New Jersey Society of CPAs

New Mexico Society of CPAs

New York State Society of CPAs

North Carolina Association of CPAs

North Dakota Society of CPAs

Ohio Society of CPAs

Oklahoma Society of CPAs

Oregon Society of CPAs

Pennsylvania Institute of CPAs

Puerto Rico Society of CPAs

Rhode Island Society of CPAs

South Carolina Association of CPAs

South Dakota CPA Society

Texas Society of CPAs

Tennessee Society of CPAs

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Wisconsin Institute of CPAs

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### Additional Sponsors\*

American Society of Executives

AmerInst Insurance Group

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Patricia Cochran

Pittsburgh Foundation

VSP

\*As of June 1, 2017



“The opportunity to participate in the ADS program is the nudge I needed to take the plunge of pursuing my PhD, and I am grateful for the support I have received thus far during my program.”

Adam Manlove, CPA, Ph.D.  
Indiana University  
ADS Cohort 2016

## ADS recognition

In addition to the tremendous support of the sponsors and participating universities, the Accounting Doctoral Scholars Program would like to acknowledge the following individuals for their contributions to this important effort:

- Margot Cella, Center for Audit Quality
- William (Bill) Ezzell, Deloitte LLP (retired)
- Manny Fernandez, KPMG LLP
- Randy Fletchall, EY LLP (retired)
- Cindy Fornelli, Center for Audit Quality
- Ellen Glazerman, EY LLP
- George Krull, Grant Thornton (retired)
- Holly Paul, PwC LLP
- Julie Peters, PwC LLP
- Dennis (Denny) Reigle, AICPA (retired)
- Beatrice (Bea) Sanders, KPMG LLP
- Kathy Shoztic, Deloitte Services LP
- Stacy Sturgeon, KPMG LLP
- Steve Matzke, AICPA
- Sylvia Ulrich, EY LLP
- Doyle Z. Williams, Ph.D.
- Julie Wood, Crowe Horwath LLP
- Jean Wyer, PwC LLP (retired)





