

Biography

Terry D. Warfield
Emeritus PwC Professor in Accounting
University of Wisconsin – Madison

January 2025

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Professor Warfield received a B.S. and M.B.A. from Indiana University and a Ph.D. from the University of Iowa. Professor Warfield's area of expertise is financial accounting. He retired from his full-time faculty position at UW-Madison in August, 2024. Prior to his academic career, Professor Warfield worked for five years in the banking industry and from 1995-1996 he served as the Academic Accounting Fellow in the Office of the Chief Accountant at the U.S. Securities and Exchange Commission in Washington D.C. While on the Staff, he worked on projects related to financial instruments, financial institutions, and helped coordinate a symposium on intangible asset financial reporting.

Professor Warfield's primary research interests concern financial accounting standards and disclosure policies, including the effects of accounting information and disclosures on securities markets. He has published articles in various scholarly and practice-oriented outlets. He served on the editorial boards of several top accounting journals and he has served as a reviewer for many other accounting and business journals. He has served on numerous committees of the American Accounting Association. Professor Warfield served as one of three academic members of the Advisory Council to the Financial Accounting Standards Board (2005-2009) and as a trustee for the Financial Accounting Foundation (2013-2019). He serves on the boards of the University of Wisconsin Credit Union, the Catholic Diocese of Madison Foundation, and is chair of the Investment Committee of the Wisconsin Public Radio Association.

Professor Warfield teaches intermediate and graduate level courses in financial reporting and he has served on numerous PhD dissertation committees (11 as the Chair). He has received teaching awards at both the University of Iowa and the University of Wisconsin and he has developed several case studies based on his research for use in accounting classes. These cases and related instructional articles have been published in *Issues in Accounting Education* and the AICPA Professor-Practitioner Case Development Program. Professor Warfield is co-author (with D. Kieso, J. Weygandt, and L. Wiley) of *Intermediate Accounting*, (19th Edition), *Intermediate Accounting: Principles and Analysis* (2nd Edition), and *Intermediate Accounting: IFRS 5th Edition*.

He is married (Mary) and has three children. He enjoys sports (particularly golf), reading, and travel.

Curriculum Vitae Terry D. Warfield

January 2025

School of Business
University of Wisconsin
4171C Grainger Hall
975 University Avenue
Madison, Wisconsin 53706
(608) 215-6753

Education

Ph.D., (Major: Accounting; Minor: Finance), The University of Iowa, 1989 (Dissertation: "The Effects of Accounting Disclosures on Bank Information Environments")
M.B.A., Indiana University, 1981; B.S., Finance, Indiana University, 1977

Positions Held

1989-Present: School of Business, University of Wisconsin – Madison
Emeritus PwC Professor in Accounting (August, 2024 – Present)
Senior Associate Dean (July 2021-August 2024)
Senior Associate Dean – Faculty & Research (July 2020 – July 2021)
PwC Chair in Accounting (2012-present)
Chair, Department of Accounting and Information Systems (2012-2020)
Professor – May 2011 – present
Director, Arthur Andersen Center for Financial Reporting and Control (2004-2014)
Robert and Monica Beyer Professor of Accounting (January 2009-2012)
Associate Professor - 1995 – 2011
Assistant Professor - 1989-1995
Aug 1995- Academic Fellow, Office of the Chief Accountant
Aug 1996 Securities and Exchange Commission, Washington, D.C.
1982-1989: Assistant Professor of Management, Purdue University Calumet
On leave from 1985-1989 at the University of Iowa - Iowa City, Iowa to pursue a Ph.D.
1977-1982: Assistant Cashier, Internal Auditor - Hoosier State Bank of Indiana, Hammond, Indiana

Honors May, 2024 WSB Dean's Distinguished Service Award
June 2023 American Accounting Association *Accounting Horizons* Best Paper Award: "Stakeholder Engagement and Effective Standard-Setting"
April 2019 Public Interest Section of AAA - Best Paper: "Standardizing, Boundary Spanning, and Information Infrastructure"
March, 2017 UW-Madison Chancellor's Distinguished Teaching Award
May, 2014 Erwin Gaumnitz Distinguished Faculty Award for Service
May, 2012 Erwin Gaumnitz Outstanding Teaching Award
December, 2009 Honored Instructors Award, UW Division of University Housing
September, 2008 Prof. Terry Warfield Most Dedicated Member Scholarship, Sigma Chapter of Beta Alpha Psi
February, 2005 *Journal of International Accounting Research* Outstanding Manuscript Award
April, 2004 Robert A. Jerred Distinguished Service Award
April, 1998-2001 PricewaterhouseCoopers Research Scholar
April, 1996 University of Wisconsin Teaching Academy
April, 1995 KPMG Peat Marwick Faculty Fellow (1995-1997)
May, 1994 Dean's Award for Teaching Excellence, Beta Gamma Sigma
May, 1993 KPMG Peat Marwick Research Fellowship

Honors, Continued

- November, 1992 "Lawrence J. Larson Excellence in Teaching Award", University of Wisconsin School of Business (1992-1993).
- December, 1991 Honorary faculty member of Golden Key Honor Society.
- November, 1991 Named as one of the "Top 100 Teachers" at the University of Wisconsin by the Wisconsin Student Association.
- April, 1988 "Chester B. Phillips Award" named as Outstanding School of Business Teaching Assistant.

I. Research and Publications

Overview: My primary research emphasis is on financial reporting. My current and planned research program is focused on evaluating the extent to which accounting reports are useful in the financial reporting process. This research is designed to increase our understanding of the role of accounting reports in the financial reporting process and to provide relevant input to accounting and disclosure policy makers.

A. Refereed Publications

- Burke, Q., Wangerin, D., and T.D. Warfield. 2025. Assuring the Crowd: The Role of Assurance in Securities Crowdfunding Success. Forthcoming at *Management Science*.
- Convery, A., M. Kaufman, and T.D. Warfield. 2023. Stakeholder Conflict and Standard-setting Foundation Oversight. *Journal of Accounting and Public Policy* (November).
- Convery, A., M. Kaufman, and T.D. Warfield. 2021. Stakeholder Engagement and Effective Standard-Setting *Accounting Horizons* (June 2022).
- Burke, Q., and T.D. Warfield. 2021. Bank Interest Rate Risk Management and Valuation of Earnings, *Accounting and Finance* (September 2021).
- Burke, Q., T.D. Warfield, and M. Wieland. 2019. Value Relevance of Disaggregated Information: An Examination of the Rate and Volume Analysis of Bank Net Interest Income. *Accounting Horizons* (October 2019).
- Clor-Proell, S., C. Proell, and T.D. Warfield. 2014. The Effects of Presentation Salience and Measurement Subjectivity on Nonprofessional Investors' Fair Value Judgments. *Contemporary Accounting Research*. Vol 31, No. 1 (Spring) pp. 45-66.
- Luo, T. and T.D. Warfield. 2012. The Implementation Effects of expanded consolidation: The Case of Consolidated Special Purpose Entities. *Accounting and Finance* (November).
- Dickinson, V., P. Kimmel, and T. Warfield. 2012. The Accounting Consequences of Accelerated Share Repurchases. *Review of Accounting Studies* Vol. 17 No. 1 (March).
- Cheng, Qiang. T. Warfield, and M. Ye. 2011. Equity Incentives and Earnings Management: Evidence from the Banking Industry. *Journal of Accounting, Auditing, and Finance*. (pp. 317-349).
- Dickinson, V., P. Kimmel, and T. Warfield. 2011. Bioscience Company: Accounting for Idle Assets. *Issues in Accounting Education* Vol. 26 No. 1 (155-163).
- Kohlbeck, M. and T.D. Warfield. 2010. Accounting Standard Attributes and Accounting Quality: Discussion and Analysis. *Research in Accounting Regulation* 22 (2010) 59-70.

- Chen, C., M. Kohlbeck, and T.D. Warfield. 2008. Timeliness of Impairment Recognition: Evidence from the Initial Adoption of SFAS 142. *Advances in Accounting*.
- Kimmel, P. and T. Warfield. 2008. Accelerating Corporate Performance: Stock Buy Backs with Zip. *Issues in Accounting Education* (February 2007): 119-128.
- Kohlbeck, M., and T.D. Warfield. 2007. Unrecorded Intangible Assets: Abnormal Earnings and Valuation. *Accounting Horizons* (March, 2007): 23-42.
- Cheng, Q., and T.D. Warfield. 2005. Equity incentives and earnings management. *The Accounting Review* (April 2005).
- Gosman, M., T. Kelly, Olsson, P. and , T. Warfield, 2004. The Profitability and Pricing of Major Customers. *Review of Accounting Studies*. Volume 9: 117-139.
- Ashbaugh, H. and T.D. Warfield. 2003. Audits as a Corporate Governance Mechanism: Evidence from the German Market. *Journal of International Accounting Research*. Volume 2: 1-21.
- Cheng, Q., P. Frischmann, and T. Warfield. 2003. The Market Perception of Corporate Claims. *Research in Accounting Regulation*. Volume 16: 3-28.
- Gribble, J., P. Kimmel, and T.D. Warfield. 2003. San Antonio Energy: Putting a Value on the Future. *American Institute of Certified Public Accountants Professor/ Practitioner Casebook* (Case No. 2003-05).
- Johnstone, K.M., H. Ashbaugh, and T.D. Warfield. 2002. Effects of Repeated Practice and Contextual Writing Experiences on College Students' Writing Skills. *Journal of Educational Psychology*. Vol. 94 No. 2, 305-315.
- Ashbaugh, H., K.M. Johnstone, and T.D. Warfield. 2002. Outcome Assessment of a Writing-Skill Improvement Initiative: Results and Methodological Implications. *Issues in Accounting Education* (May) Vol. 17, No. 2, 123-148.
- Johnstone, K., M. Sutton, and T. Warfield. 2001. Antecedents and Consequences of Independence Risk: Framework for Analysis. *Accounting Horizons* (March): 1-18.
- Gribble, J., P. Kimmel, and T.D. Warfield. 2001. New World, New Benefits. *American Institute of Certified Public Accountants Professor/ Practitioner Casebook* (2001).
- Ashbaugh, H., K. Johnstone, and T. Warfield. Corporate Reporting on the Internet. *Accounting Horizons* (September 1999): 241-257.
- Frischmann, P., P. Kimmel and T.D. Warfield. Innovation in Preferred Stock: Recent Trends and Implications for Financial Reporting. *Accounting Horizons* (September 1999): 201-218.
- Frischmann, P. and T.D. Warfield. Multiple Motivations and Effects: The Case of Trust Preferred Stock. *Issues in Accounting Education* (May 1999)
- Bandyopadhyay, S., and T.D. Warfield. Market Valuation of current value accounting adjustments: Recognition lag and unrecorded assets. *Research in Accounting Regulation* (1998): 127-148.
- Bauman, C. C., J. Gribble, and T.D. Warfield. Evaluating the Valuation Allowance. *American Institute of Certified Public Accountants Professor/ Practitioner Casebook* (1998).

Frischmann, P., P. Kimmel and T.D. Warfield. Innovative forms of preferred stock: Debt or Equity. *Commercial Lending Review* (Fall 1995): 14-27.

Warfield, T.D., J.J. Wild, and K.L. Wild. Managerial ownership, accounting choices and informativeness of earnings. *Journal of Accounting and Economics* (July, 1995).

Kimmel, P., and T.D. Warfield. The usefulness of hybrid security classifications: Evidence from redeemable preferred stock. *The Accounting Review* (January 1995): 151-167.

Kimmel, P., and T.D. Warfield. Variation in attributes of redeemable preferred stock: Implications for accounting standards. *Accounting Horizons* (June 1993): 30-40.

Crooch, G.M., P. Kimmel, and T.D. Warfield. Fast-Tech: The accounting challenges of innovative financial instruments. *American Institute of Certified Public Accountants Professor/ Practitioner Casebook* (1993):93-05 1-17.

Reprinted in a) *University of Wisconsin School of Business Best Practices - Teaching*. R.D. Nair, editor. (1994); b) Ferris, K. *Financial Accounting and Corporate Reporting: A Casebook*. (1995) R.D. Irwin Inc., Chicago, IL.

Warfield, T.D., and J.J. Wild. Accounting recognition and the relevance of earnings as an explanatory variable for returns. *The Accounting Review* (October 1992): 821-842.

Warfield, T.D., and T. Linsmeier. Tax planning, earnings management and the differential information content of bank earnings components. *The Accounting Review* (July 1992) : 546-562.

Kimmel, P., J. Kuhn and T. Warfield. Mark to market accounting: Theory, politics and economic consequences. *American Institute of Certified Public Accountants Professor/ Practitioner Casebook* (1992):92-05 1-9.

This case is also reprinted in: A catalog of resource materials for teaching students critical thinking. *Federated Schools of Accountancy Report on Pedagogical Resources*. (1994).

Warfield, T.D. Revisions in disclosure rules: An examination of disclosure costs for U.S. banks. *Research in Accounting Regulation* (1991) Volume 5, pp. 3-30. JAI Press Inc.

B. Monographs and Books

Kieso, D., J. Weygandt, T. Warfield, L. Wiley. 2025. *Intermediate Accounting* (19th Edition). John Wiley and Sons. New York, NY. (2025)

Kieso, D., J. Weygandt, and T. Warfield. 2024. *Intermediate Accounting*. IFRS Edition (Fifth edition) – 2024. John Wiley and Sons. New York, NY. (2024)

Kieso, D., J. Weygandt, and T. Warfield. 2022. *Intermediate Accounting* (18th Edition). John Wiley and Sons. New York, NY. (2022)

Kieso, D., J. Weygandt, and T. Warfield. 2020. *Intermediate Accounting*. IFRS Edition (Fourth edition) – 2020. John Wiley and Sons. New York, NY. (2020)

Kieso, D., J. Weygandt, and T. Warfield. 2019. *Intermediate Accounting* (17th Edition). John Wiley and Sons. New York, NY. (2019)

Kieso, D., J. Weygandt, and T. Warfield. 2017. *Intermediate Accounting*. IFRS Edition (Third edition) – 2017. John Wiley and Sons. New York, NY. (2017)

Warfield, T. J. Weygandt, and D. Kieso. 2008. *Intermediate Accounting: Principles and Analysis*. 2nd Edition. John Wiley and Sons. New York, NY.

Kieso, D., J. Weygandt, and T. Warfield. 2003. *Fundamentals of Intermediate Accounting*. John Wiley and Sons. New York, NY.

Warfield, T.D., and S.L. Henning. *Financial reporting by credit unions in the United States*. Center for Credit Union Research, Filene Research Institute. Madison Wisconsin. 1994.

C. Other Publications (* - refereed)

Warfield, T.D. 2004. "Stock Option Accounting: Déjà vu All Over Again." UW School of Business *Update*. (December 2004.)

* Kimmel, P. and T. Warfield. 2004. The SEC's Report on Principles-Based Accounting. *The Journal of Corporate Accounting & Finance*. Hoboken: Vol. 15 (6) pg. 43-50.

Warfield, T.D. 2003. "After the Fall: Picking up the pieces of financial reporting." UW School of Business *Update*. (Spring 2003.)

* Frischmann, P., P. Kimmel, and T. Warfield. 2000. Innovation in Preferred Stock: Current Developments and Implications for Financial Reporting -- Abstract -- "Status Report -- Research Supplement," *Financial Accounting Series* No. 212-A (September 29, 2000). FASB. Norwalk, CN.

Warfield, T.D., 2000. Book Review of Storey, R. and S. Storey. *The Framework of Financial Accounting Concepts and Standards* in *The Accounting Review* (January).

Lang, M. and T. Warfield (Principal authors) 1997. AAA response to FASB Invitation to Comment on the Recommendations of the AICPA Special Committee on Financial Reporting and Association for Investment Management and Research. *Accounting Horizons* (March 1997).

Warfield, T.D., J. Gribble; M. Lang; C. Lee; T. Linsmeier; S. Penman; D. Shores; J. Smith; R. Stephens. AAA Response to the FASB Exposure Draft, "Proposed Statement of Financial Accounting Standards - Accounting for Certain Liabilities Related to Closure or Removal of Long-Lived Assets." *Accounting Horizons* (December 1996): 137-141.

Warfield, T.D., J. Gribble; M. Lang; C. Lee; T. Linsmeier; S. Penman; D. Shores; J. Smith; R. Stephens. AAA Response to the FASB Exposure Draft, "Proposed Statement of Financial Accounting Standards - Accounting for Transfers and Servicing of Financial Assets and Extinguishment of Liabilities" *Accounting Horizons* (September 1996): 78-181.

Warfield, T.D., J. Gribble; M. Lang; C. Lee; T. Linsmeier; S. Penman; D. Shores; J. Smith; R. Stephens. AAA Response to the FASB Exposure Draft, "Proposed Statement of Financial Accounting Standards—Consolidated Financial Statements: Policy and Procedures" *Accounting Horizons* (September 1996): 182-185.

Warfield, T.D. Developments in the S.E.C. Office of the Chief Accountant. *Financial Accounting and Reporting*. (Summer 1996). American Accounting Association.

Owens, A. and T.D. Warfield. Overview and Background - SEC Symposium on Accounting and Reporting of Intangible Assets. (April 1996). U.S. Securities and Exchange Commission.

Warfield, T.D. Team Learning in Intermediate Accounting. *Instructor's Manual* for Kieso, D., and J. Weygandt. *Intermediate Accounting*. (8th Edition. 1994), (9th Edition. 1997). John Wiley and Sons.

D. Working Papers

Convery, A., M. Kaufman, and T.D. Warfield. 2022. Pluralistic Governance, Voluntary Standards, and the Field-Level Search for Accounting Innovation (December).

Komissarov, S. and T. Warfield (2022) The Impact of GAAP Guidance on Asset Retirement Obligations: An Investor Perspective. (July) under review at *International Journal of Accounting and Finance*.

E. Work in Progress

Dickinson, V., S. Komissarov, and T. Warfield (2013) The Relevance and Faithful Representation of Pension Measurements (February) Working Paper.

Swenson, L., D. Wangerin, T. Warfield (2012) Asset Recognition and Cost Recoverability: Evidence from Direct-Response Advertising Costs (January) Work in Progress.

Research Grants/Funding

- PwC Foundation – \$25,000 Inquiries Grant to Support Capstone Course Development (2014)
- PricewaterhouseCoopers Foundation – \$50,000 IFRS-Ready Curriculum Grant (2009-2010)
- PricewaterhouseCoopers Foundation – \$150,000 Ethics and Professionalism Program Grant (2004-2007)
- PricewaterhouseCoopers Research Scholar (1998-2001) - summer research support.
- KPMG Peat Marwick Foundation (1993-1997) - \$50,000 Faculty Fellowship
- Center for Credit Union Research, Madison, WI. (1992-1993) - 1/9 summer salary support.
- Ernst and Whinney Foundation (1988-1989) - \$18,000. Doctoral Dissertation Grant.
- Research Committee of the Graduate School, University of Wisconsin - Madison
 - 1998 - 1/9 Salary Support and Research Assistant
 - 1992-1993 - Project Assistant.
 - 1990-1991 - 2/9 summer salary support.
- Department of Accounting, University of Wisconsin - Madison
- 1992 - 1993 -- Grant Thornton Research Fellow (1/9 summer salary support).

II. Teaching

A. Primary Teaching Areas: Financial Accounting and Reporting
Financial Accounting Theory
Fundamentals of Accounting and Finance for Non-Business Majors
Executive MBA – Introductory Financial Accounting
Doctoral Seminar in Financial Reporting

B. Teaching Experience

1. 1989 - present: School of Business, University of Wisconsin - Madison
Undergraduate, Masters, MBA Financial Reporting and Supervision of PhD Students (20 dissertations since 1989, 10 as chair).
2. August, 1985 - August, 1989: The University of Iowa -- Teaching Assistant
Introductory Financial Accounting; M.B.A. Financial Accounting
3. August, 1981 - August, 1985: Purdue University Calumet -- Assistant Professor
Introductory Financial Accounting, Introductory Managerial Accounting, Business Policy

III. Service

A. University Service -- University of Wisconsin

- Freshmen Convocation (2016-2019, 2022, 2023)
- Commencement Platform (2017-2019, 2022, 2023, 2024)
- Deputy Secretary of the Faculty Search (2022)
- University Committee (2017-2020), Chair (2019-2020)
- School of Business Dean Search, Chair (2016-2017), Member (2018)

- Shared Governance Budget Committee (2015-2017)
- Vice-Chancellor Finance and Administration Search, Chair (2016)
- Budget Model Development Committee (2014, 2015)
- Campus Budget Workgroup (2013)
- Resource Allocation CorePlus Team (2012-2013)
- PROFS Steering Committee (2010-present)
- Associate Dean of Students Search Committee (2007)
- Student Policies and Non-Academic Program Committee (2006-2009)
- Student Non-Academic Misconduct Board (1996-2006), Chair (2001-2004)
- Campus ATM Review Committee (2002-2003)
- Instructional Technology Grant Review Committee (1997-1998, 2000, 2001)
- SOAR Speaker -- Journey into the Classroom (Summer, 1997-2006, 2008, 2009)
- DoIT Director Search Committee (1999)
- Information Technology Committee (1997-1998)
- Participant in SOAR dinners for Freshmen Orientation (Summer 1990-1994)
- Welcome Week Speaker for the UW-Madison Center for New Student Development (September, 1991)
- Minority Students Faculty Mentor, 1992-1993.
- Participant in The Wisconsin Idea Seminar for new UW - Madison Faculty (May, 1990)

B. Service - School of Business

- Teaching Improvement Program – What Every TA Should Know (2013-2024)
- Chair, Department of Accounting and Information Systems (2012-2020)
- Dean's Review Committee (2015-2016)
- Integrated Learning Steering Committee (2015-2016)
- Search Committee for Human Resources Associate Dean (2014)
- Sub-Committee of the Executive Committee (2011-2014), Chair (2011-2012; 2013-2014)
- Governance Committee, Accenture Leadership Center (2007-2009)
- Faculty Senate (2007-2011, 2014-2015)
- Undergraduate Curriculum Committee (2005-2007)
- Ad-Hoc Undergraduate Program Review Committee, Chair - Co-Curricular Sub-Committee (2005-2006); Implementation Committee (2006-2007)
- Search and Screen Committee, Director of Graduate Career Services (2003)
- Chair, Dean's Task Force for Masters Placement (2002-2003)
- Dean's Search Committee (2001)
- Academic Planning Council (1997-1999, 2003-2004)
- Computer Committee (1991 - 1999); Chair, (1996-1998)
- Instructional Technology Subcommittee, (1992 - 1994)
- Business Scholars Program, 1993-1998.
- Committee on Development of Mentoring Guidelines (1992-1993)

C. Departmental Service - School of Business, Department of Accounting

- Recruiting Committee (1996-2003 (Chair, 1997-1999), 2011-2012)
- Professional Programs Committee (2007-2009), (Chair – 2007-2009).
- Faculty Advisor – Beta Alpha Psi (1998-2008)
- 5-Year Professional Program Committee (1997-2006), (Chair, 2000-2001)
- Curriculum Committee, 1992 – 2007 (Chair, 1999-2007).
- Chair, Robert Beyer Center Review Committee (1996-1997)
- Accounting Research Workshop Co-Coordinator, 1990-1994.
- Library Coordinator, 1991-1992.
- Faculty Representative to Big Ten Accounting Doctoral Consortium, July, 1992.

- Departmental Representative to School of Business Orientation Week Sessions - August, 1991, 1992, 1993.

D. Professional Service

Financial Accounting Foundation

- Financial Accounting Standards Advisory Council (2006-2009). One of two academic members; FASAC advises the Financial Accounting Standards Board (FASB) on issues related to projects on the Board's agenda, possible new agenda items, project priorities, procedural matters that may require the attention of the FASB, and other matters as requested by the chairman of the FASB.
- Chair, FASB/IASB Issues Conference, 2009-2010. Invited attendee annually since 1991, many times serving as discussion leader.
- Member, FASB Financial Accounting Standards Research Initiative Advisory Board (2012-2020).
- Trustee (2013-2019), Co-Chair, Standards Setting Oversight Committee (2015-2019)

American Accounting Association

- *Accounting Horizons* Steering Committee (2016-2021)
- Regulations Committee, Chair (2007-2008)
- Committee on Financial Accounting Standards (three year term 1994-1997). Chair - 1995-1996.
Testified for Committee at FASB hearings on FASB Exposure Draft, "Proposed Statement of Financial Accounting Standards - Accounting for Transfers and Servicing of Financial Assets and Extinguishment of Liabilities (1996).
- At-large Council Representative, 1996-1997.
- Nominating Committee (1997-1998; 2005-2006)
- AAA-FASB Research Conference (1999-2002; 2005-2006)
- Annual Meeting Advisory Committee (2003-2004)
- Trueblood Seminars Planning Committee (2003-2004)
- Financial Accounting and Reporting Section
Past-President, Mid-Year Meeting Chair (2005-2006)
President (2004-2005)
President-Elect (2003-2004)
Associate Editor, Annual Meeting Research Program (2003)
CPE Coordinator (2000-2003)
- Editorial and Reviewing Services
The Accounting Review Editorial Board (1994-1999).
Ad-Hoc Reviewer (1991-2005).
Accounting Horizons - Editorial Board (1997-2005, 2015-2019)
Issues in Accounting Education – Editorial Board (2000-2005)

Other Editorial and Reviewing Service

Ad-Hoc Reviewer for: *Journal of Accounting Research*, *Journal of Accounting and Public Policy*, *Financial Management*, *Journal of Business, Finance and Accounting*, *Contemporary Accounting Research*, *Journal of Accounting and Economics*, *Journal of Accounting, Auditing and Finance*, *Research in Accounting Regulation*, *Review of Accounting Studies*.

Other Consulting

- Catholic Diocese of Madison Foundation, Board of Directors, (2019-present)
- University of Wisconsin Credit Union, Board of Directors, (2019-present), Chair, Funds Management Committee (2019-present)
- Investment Committee, Wisconsin Public Radio Association (2012-present), Chair 2014-present.
- University of Wisconsin Credit Union, Funds Management Committee, (2015-2019)
- AACSB Peer Review Team – University of Texas – Arlington (2021-2022)

- AACSB Peer Review Team – University of Arizona (2017-2018)
- External Academic Review Panel, Chair, School of Accountancy, Singapore Management University (2015-2016)
- AACSB Peer Review Team – Michigan State University (2015-2016)
- Finance Council – Blessed Sacrament Parish, Madison, WI (2010-present), Chair School Budget (2012-present)
- International Accounting Standards Board (London). Consultant on IFRS for Small and Medium Size Entities. Developer/Reviewer of Educational Modules (2009-2010).
- Invited speaker to INROADS: Rising Juniors – “Success Tips for Intermediate Accounting” Nashville, TN (July 2007)
- Invited Participant / Testimony – FASB Roundtable on Stock Option Accounting (June 2004).
- University Bookstore Board of Trustees (2000-2009), Vice-Chair (2003-2009).
- Faculty Advisory Committee - PricewaterhouseCoopers Foundation (2000-2001).
- NASDAQ Delisting Hearing, Symons International - Market Valuation of Hybrid Securities (2000).
- University of Iowa Department of Accounting, Professional Advisory Council (1996-2000).
- American Institute of Research, Consultant on Analysis of Tasks and Skills for the AICPA (2000).