



Department of Accounting



Scene from Department of Accounting Annual Faculty Retreat



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From the Chair

Dear Friends of the Department of Accounting,

I hope you are doing well! Since our last newsletter, both the Kelley School and the Department of Accounting have continued to enjoy remarkable successes. The undergraduate accounting program was again ranked #4 overall by U.S. News & World Report, while our graduate accounting programs were ranked #5 by College Consensus. While many peer and aspirant schools have seen substantial declines in accounting enrollments, ours have held steady at roughly 1,300 declared undergraduate accounting majors, and that number is forecasted to increase over the next two years. Enrollments in our graduate accounting programs have also remained robust. In short, our accounting enrollments continue to be strong despite the decline in accounting students nationally.



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The department's faculty has also continued to grow and succeed. Earlier this year our very own Pat Hopkins was appointed Vice Dean of the Kelley School in Bloomington, and Brian Miller was appointed as Associate Chair of the Full-Time MBA Program. After serving three years as Chair of the Graduate Accounting Programs (GAP), we will welcome Leslie Hodder back to the department and Joe Schroeder will move into the GAP Chair role. We have also hired nine additional full-time accounting faculty who will join the department in summer 2023. (See new faculty spotlights on pages 16–19). With these latest hires, the department has recruited a total of 23 new full-time faculty during my three years as department chair! This surge in faculty hiring has been driven by several factors, including faculty retirements, departures, and growth in the undergraduate program at the Kelley School. At the start of the 2023–24 academic year, the department will have 54 full-time faculty!

The department continues to review and enhance the accounting curriculum to ensure that our programs are pedagogically strong, highly ranked, and attract the best students from across the country and around the world. In fall 2022 we launched three new, undergraduate accounting workshop courses: Assurance and Risk Advisory Workshop, Tax Advisory Workshop, and Corporate Accounting Workshop. These courses focus on educating students about careers in particular areas of accounting and emphasize interactions with accounting professionals and soft skills development. (See articles on pages 3–6). In addition to our workshop courses, Bree Josefy and Katie Metz developed a new, undergraduate Sustainability Reporting and Analysis course, which will be offered for the first time in fall 2023. (See article on page 14.)

This year the department's DEIB Committee launched a series of initiatives focusing on student and faculty engagement.

In February 2023 the inaugural “A Seat at the Table” event brought together first- and second-year Kelley students and accounting professionals to talk about opportunities and rewards in the accounting profession. (See article on page 9.) The DEIB Committee also developed a “Spotlight” blog series that highlights individual accounting students and faculty (see Spotlights here: accountingblog.kelley.iu.edu/) and delivered a series of new teaching workshops to support and enrich the accounting faculty.

After a three-year hiatus, the department hosted the Accounting Alumni and Friends Recognition Banquet in October 2022. It was a joy to bring together so many friends of the department and recognize the remarkable achievements of a select group of accounting alumni and allies. (See article and photos on pages 12–13.)

I hope you continue reading this newsletter, which highlights many additional department events from the past year. But first, I would like to say “thank you!” to the many people I have had the good fortune of interacting with in the past year, especially the Accounting Advisory Group members, alumni, and recruiters who support the department in countless ways. It is truly a privilege for me to serve as Chair of the Department of Accounting at Kelley.



With warm regards,
Sonja Rego
KPMG Professor of Accounting

FALL ACCOUNTING WORKSHOPS

Assurance & Risk Advisory Workshop

by Christy Heitger-Ewing

Typically, students come into accounting thinking that they must choose between two career paths—tax or audit. The truth, however, is that a wide variety of careers are available to accounting majors. That's precisely what Kelley's four accounting workshops are designed to showcase.

“A student may start in tax or audit, but these workshops are about opening their eyes to the many career possibilities that might be a great fit for them,”

Professor Lori Bhaskar
Assurance & Risk Advisory Workshop

“Even picking between tax and audit is hard because students are selecting this career path as freshmen, sophomores, and juniors when they don't really understand what audit is since they don't take that class until their senior year. Taking these accounting workshops early helps them understand how many careers there are and gives them a little taste of each.”



The goal of these workshops is for students to find the career that best suits them. This process involves self-awareness (asking “What do I enjoy doing? What am I good at?”) as well as career awareness (asking “What career opportunities exist?”), then developing professional skills to succeed in those careers.

“Those goals overlap for these three workshops, but how we [professors] go about that is different for each of us,” says Bhaskar. “The workshop involves experiential learning. It was important for me that the students were able to meet, learn from, and network with a diverse set of professionals working in a diverse set of related accounting fields.”

Last fall Professor Bhaskar had more than 30 professionals from practice in a wide variety of assurance and risk advisory careers visit her class to participate in panels. Panelists share their job descriptions and participate in a Q&A session. After class, Bhaskar holds networking socials to provide an informal opportunity for students to chat with the professionals, garner advice, and practice networking. Many students say this is their favorite part of the workshop.

When Brooke Knapp came to IU, she knew she wanted to go into audit, but she wasn’t familiar with the inner workings of the industry.

“The accounting workshops helped me understand the work auditors do and helped me fine-tune what sort of auditing I wanted to do,” says Knapp. “Networking with professionals allowed me to ask specific questions, which helped me understand which industries I was interested in.”

Ellie Pedersen’s vision evolved immensely as a result of taking these workshops.

“I’m interested in pursuing a career in risk advisory or forensics post-grad,” she says. “As a freshman, I couldn’t tell you what either of those jobs were, much less why I think I would be a good fit for them.”

Prior to taking these accounting workshops, Emma Fine was unsure which career path was right for her.

“This workshop opened my eyes to the different opportunities available and helped me develop my professional skills in a way that will help me be successful for the long run,” says Fine. “I got a much better view of the day-to-day in accounting careers at different levels. I also learned about what I want from a company and how to ask the right questions.”

Students in these workshops go on a combined weekend field trip to Chicago. Each workshop splits off to do their own thing. Bhaskar’s group visits several professional firms (e.g., KMPG, EY, Protiviti). Then in the evening, the whole group of 60 to 70 students gather for an alumni networking event where they get to mingle with more than 60 IU alum accounting professionals.

“It’s amazing how excited the professionals are to see the students,” says Bhaskar.

This field trip takes place two weeks before fall’s big recruiting event. Last fall, some students who didn’t have internship offers were feeling anxious. When they saw that these professionals were interested in hiring them, however, it was a confidence booster.

“I would be in way over my head even applying for the most basic position if not for the workshop course,” says Anthony Lang. “My advice to any accounting major is to absolutely take one of the workshop classes.”



FALL ACCOUNTING WORKSHOPS

Tax Advisory Services Workshop

by Christy Heitger-Ewing

The Tax Advisory Services Workshop is not only for students who want to pursue a traditional public accounting career path. It is for those who are interested in networking with professionals from a number of different tax careers.

“We cover the traditional tax-focused careers in public accounting firms, but we also do so much more,” says Professor Fred Coleman, who teaches the workshop.

Because most of the workshop students have never taken a tax course, Coleman teaches what he calls the “sexy tax topics.” This includes concepts of merger and acquisition taxation and international taxation. He invites roughly 20 professionals to speak to the students throughout the semester about eight to ten different career options in tax.

“Some of the speakers talk about state and local taxes, for instance,” says Coleman. Last fall students took a field trip to Chicago where they went to Alvarez & Marsal (A&M), a tax and consulting firm, as well as PwC and Grant Thornton. At some point in the future, Coleman hopes to take his students to Washington, D.C. so that they can really dig into the area of tax lobbying.

“There are many different career areas the students wouldn’t think of as a potential for tax,” says Coleman, who always invites in professionals from the Big Four as well as mid-tier firms.

“I’m trying to get more companies like Walmart and other corporations to talk about corporate tax,” says Coleman. For each topic, he brought in professionals who worked at various levels within the organization. For instance, he’d invite a person who was in their first two or three years of their career in addition to a supervisor and executive manager. He also brought in recent IU interns so that they could give students an idea of the types of work they would be doing as an intern as opposed to a permanent position.

“Students really appreciated that,” says Coleman, who plans to do roundtable discussions in a social setting following the workshops to provide a chance for more discussion among students and professionals this fall.

“Some students are quiet while others are more vocal during class so these networking socials will enable all students to feel comfortable asking their questions,” says Coleman.

Where Coleman’s workshop differs from the others is the amount of material he teaches.

“I dig more heavily into content areas since most of my students are interested in private equity kinds of transactions,” says Coleman. “Any kind of merger or acquisition transaction has a tax impact. I knew that if I could teach them concepts about the tax implications surrounding a deal like a merger or acquisition, students would find that very interesting.”

The level of exposure that these accounting workshops offer as far as networking is incomparable to others at Kelley. Another huge plus to the program is the commitment from Department of Accounting alumni.

“The alums really want to connect,” says Coleman. “The same is true of the professionals.”

In the spring of 2023, all of the professors who taught these four accounting workshops and the prerequisite Introduction to Accounting Careers course—Lori Bhaskar, Jason Brown, Fred Coleman, Dave Greene, and Brett Levitt—received Kelley’s Teaching Innovation Award for having conceived of creative ideas to not only expose students to various career options in accounting but also provide them with numerous networking opportunities, which students find particularly inviting.

“I have learned the importance and art of networking and leveraging this to aid in my exploration of careers,” says student Kristen Johnson.

Corporate Accounting Workshop

by Christy Heitger-Ewing

When Audra Kaczmarek first got to IU, she was a finance major set on joining a business fraternity and being accepted into the Investment Banking Workshop. After taking Introduction to Financial Careers and Concepts, she quickly realized that 80- to 90-hour work weeks were not something she wanted to pursue. She took a couple of accounting courses and liked them, but she had no idea what a career in accounting would look like.

"I remember telling my parents how I wished there was an accounting workshop so I could learn even more about the field," says Kaczmarek. As luck would have it, during her sophomore year, Kelley rolled out several new accounting workshops. The following semester she took A313, which exposes students to a broad number of careers in accounting. Students can then apply to take one of the other three workshops that gets into more focused detail for prospective accounting careers. Kaczmarek took the A317 Corporate Accounting Workshop, which also covers consulting and advisory roles.

Last fall professionals from firms such as Cummins as well as those from Big Four accounting firms and other consulting financial advisory firms came to talk to the students.

"We invited a combination of companies that recruit heavily at Kelley and companies that students would be interested in such as Eli Lilly, General Mills, and Proctor & Gamble," says Professor Jason Brown, Ernst & Young Faculty Fellow, who taught the workshop last fall. This fall, the Department of Accounting hopes to have a mix of alumni-rich companies that are local (e.g., Indianapolis, Chicago, etc.) and to tap into Professor Brett Whitaker's experience on the west coast, bringing in folks from the Big Four Firms (E&Y, PWC, KPMG, Deloitte) and industry companies (like ZipRecruiter, Nike, and Amazon).

"We'll also try bringing in smaller regional companies, firms, and folks from all different levels to ensure broad exposure to what's possible," says Whitaker, who will be teaching Corporate Accounting this fall. Prior to joining the faculty at Kelley, Whitaker's career was in the corporate tax and accounting space, so his insights will be invaluable to students.

"Hearing so many professionals' experiences and advice has been incredibly helpful in choosing my career

path," says Kaczmarek, who landed a 2023 summer internship with KPMG in Chicago as an advisory, internal audit, and enterprise risk intern.

"My dream is to be the CFO of a cruise line company to combine my love of cruising with my passion for accounting!" says Kaczmarek.

Kunaal Rao originally intended on pursuing audit as a career but now is considering investment banking, private equity, or transaction advisory.

"Taking A313 and A317 widened my knowledge regarding the careers present in both accounting and finance," says Rao. "Both classes enable you to frequently read macro, stock, and economic data while teaching you the fundamental/technical knowledge required in accounting and finance careers."

James Hunt was waffling about his career path before taking A313. Although he originally thought he wanted to go into investment banking, his experience in the workshops

assured him that accounting would be a great place to start his career. One of his favorite

memories from the corporate workshop was completing a case and presentation with his group that used Tableau data visualization software.

"Utilizing software that was unfamiliar to us was extremely challenging, but it provided great satisfaction to learn the software knowing that it would be useful in our future," says Hunt.

Although Whitaker is a relatively new teacher, he loves being in the classroom.

"I don't believe we talk enough about what it's like to actually work in corporate America, especially in business, and I want to discuss the good, the bad and the contextual," says Whitaker. "The goal in this workshop is to provide a safe environment to discuss practical aspects of the corporate environment and constructive ways to find success within it."

"I remember telling my
parents how I wished there
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about the field,"

Audra Kaczmarek

FALL ACCOUNTING WORKSHOPS

Financial & Transactional Consulting Workshop

by Christy Heitger-Ewing

Fifteen years ago, Professor Dave Greene was teaching a class in which he had students split into teams to present real-world cases—each one designed to introduce a career at a granular level that students wouldn't be familiar with. One day after class, a student approached Greene and stated, "I hate you."

He continued, "I came into the program knowing exactly what I wanted to do when I graduated. I've now changed my mind every Friday for the last five weeks!"

Unfortunately, this conversation took place two weeks after the drop date to interview for positions. Introducing people to a career after it's too late to interview for that position is of limited value. This is precisely why the Department of Accounting began offering four career awareness workshops to students last year.

"You can't get the right job if you're not aware of the career to begin with," says Greene, who has his students break into teams and work for six weeks to prepare a profile at a practice level in his Financial & Transactional Consulting Workshop.

"The point is to get students to think like a venture capitalist," says Greene. "When you take a job, you're making an investment in the company."

Students should be asking, "What's your market share? How fast are you growing? Who are your clients? What's your organizational structure? How many people from IU have you hired?"

"Most of the [aforementioned] things are not public information, and the only way you can get it is by talking to people who know the answer," says Greene.

Joseph Webster appreciated how the course taught him to sell himself inside and outside of interviews.

"We learned how to present like professionals and how to separate ourselves from our peers by showing initiative," says Webster.

If you consider all of the professionals that students talk to in preparing their profiles, in addition to the ones who are guest speakers in class, participate in the career fair, and network during the field trip, Greene estimates that close to 300 alumni are involved in this class.

"At the end of each class period, Professor Greene tells everyone that they should be better/different leaving the class than they were when they arrived," says student Cooper Davis. "I truly do believe I grew in some way each Friday I spent in that three-hour class, whether it be in my mindset regarding my future, my ability to network with professionals at various levels in an organization, or my ability to communicate effectively."

Kristen Johnson says this workshop has completely changed her mindset on school and work by opening her up to so many opportunities. "I've gained knowledge of how to network and engage in business formalities that I would have never known if I hadn't taken this workshop," she says. "I've learned how to speak with recruiters, how to self-assess and give feedback to peers, how to derive meaning from data, and how to use current events in a networking conversation."

Morgan Dabagia feels that this workshop was the most applicable class she took at IU. "Each week it felt like my knowledge about finance, accounting, the M&A landscape, current events, professionalism, and



presentation skills grew exponentially," she says, whose favorite part was getting to know her classmates. "We shared this common experience of giving up our Friday mornings to develop crucial skills in career readiness, professionalism, and general network building," she says. "The overall class environment was not driven by competition but by teamwork and camaraderie."

Webster says that the way these classes force students to think outside the box and consider different points of view is unlike any other class at Kelley. "If you're looking for something challenging that will help you grow, I recommend taking an accounting workshop and pursuing your MBA in the 3/2 program here at Kelley," he says.

Kelley Accounting Research Symposium

by Christy Heitger-Ewing

Prior to the pandemic, the Department of Accounting hosted two research conferences: the Accounting Leading Scholars Symposium series (sponsored by Crowe LLP) and the Hoosier Accounting Research Conference (HARC). With the Accounting Leading Scholars Symposium, the department invited a prominent influential accounting scholar to address the faculty, work with PhD students, and deliver presentations on what's new in accounting research and practice. In contrast, HARC brought in four junior scholars from other universities for a two-day conference.

COVID paused all events and conferences for several years. Coming out of the pandemic, the Department of Accounting opted to merge these two conferences and create the Kelley Accounting Research Symposium. In September 2022, Jeff Hales from the University of Texas-Austin served as the leading scholar. An expert on

Environmental, Social and Governance (ESG) and sustainability, he's a member of the International Sustainability Standards Board which writes the new ESG reporting standards. The department then invited in several junior scholars from around the country who conduct research on ESG and sustainability reporting.

"We continue to be extremely grateful to Crowe and IU alum Derek Bang, a partner in the healthcare group, for supporting this initiative," says Joe Schroeder, Associate Chairperson of the Graduate Accounting Program.

The next Kelley Accounting Research Symposium will occur November 10–11 and will include leading scholar Robert Knechel from the University of Florida.

"We're looking forward to making this symposium better and better," says Schroeder. "We want to find ways for our research initiatives to have a greater impact on the accounting profession and others' scholarly work."





A Seat at the Table

by Christy Heitger-Ewing

When students apply to IU, they must declare a major. “That’s not really fair because we’re asking students to make a choice about something that they’re pretty much totally uninformed about,” says Professor Bridget Stomberg, Glaubinger Chair for Undergraduate Leadership and Undergraduate Program Faculty Chair.

In February 2023, the Department of Accounting kicked off A Seat at the Table, the first of a series of events designed to help undergraduate students get a better understanding of the diverse career opportunities that exist in accounting.

“The goal was to gather students who are considering majoring in accounting and give them information about different career paths in accounting,” says Stomberg. “We try to emphasize the cool parts of being an accounting major and break the myth that it’s just about filling out

forms all day or only thinking about debits and credits.”

The Department of Accounting hosted roughly 40 students for the event, which included 11 roundtables. Each table included an accounting faculty member to facilitate conversation, an accounting professional who answered questions, and four to five students. Professionals then rotated among tables, giving students the opportunity to interact with different professionals.

“It was almost like speed dating type of feel,” says Stomberg. “The professionals spent 10 to 15 minutes at a table, covering a specific topic or question.”

Future events may be a different format—perhaps a panel—but the purpose will remain the same: to give students an opportunity to have conversations with professionals and faculty to provide a more accurate depiction of what careers in accounting look like.

Institute for Business Analytics' Annual Forum on Accounting and Finance Analytics: Perspectives on ESG Reporting

by Christy Heitger-Ewing

In September 2022, over 60 Kelley students and professionals gathered for the Institute for Business Analytics' (IBA) Forum on Accounting and Finance Analytics. The forum provided students with varying perspectives on the role of environmental, social, and governance (ESG) reporting—from the board of directors' perspective of understanding demands from regulators, shareholders, and other stakeholders, to the evolving data landscape and the role of assurance and internal controls.

Accounting professors Terry Campbell and Bree Josefy organized the annual forum with Tom Andreesen, a founding Managing Director with Protiviti Inc. and leader of Protiviti's Chicago office, IBA Co-Directors Haizhen Lin, Associate Professor in Business Economics and Public Policy, and Jingjing Zhang, Associate Professor in Operations & Decision Technologies.

The week prior to this practitioner-based forum, the Department of Accounting hosted the Kelley Accounting Research Symposium on ESG that brought in academic researchers who have authored papers about its different aspects. The two events paired well with each other and demonstrated the unique role higher education plays in merging research with practice.

"It's important to equip our students with the awareness of what ESG is and how it is currently being reported by companies. The landscape of ESG reporting is rapidly changing and increasing in importance because of increasing stakeholder demand for transparency around ESG matters and pending regulations from the SEC," says Josefy.

“This is not unique to the U.S. The EU’s recently enacted Corporate Sustainability Reporting Directive modernizes and strengthens the rules concerning the social and environmental information that EU companies are required to report. Helping our students understand what ESG entails and how it relates to financial reporting is important.”

Harry Kraemer, executive partner with Madison Dearborn Partners, a private equity firm based in Chicago, Illinois, and a Clinical Professor of Leadership at Northwestern University’s Kellogg School of Management, focused on the board of directors’ perspective on ESG. He emphasized that ESG is not a passing trend. He believes that ESG is shaping better business practices as companies become more aware of their environmental footprint, social impact, and governance obligations. Kraemer also pointed out that boards of directors are shifting their focus from shareholder value to stakeholder value, considering anyone who is impacted by the company’s resources, products, or actions.

“Shareholder value is important, but it should not be the only consideration,” Kraemer noted. “Companies should also focus on their social and environmental responsibilities to maximize the value they provide to stakeholders.”

Bob Hirth and Steve Wang, both senior executives with Protiviti, brought their perspective on the role of internal controls and assurance over ESG data and reporting. Hirth has been at the forefront of the ESG movement for years, and he believes that there is tremendous opportunity for those with the right expertise in accounting, finance, and analytics.

As Hirth emphasized, “Accounting and data analytics majors already have many of the core skills needed to help organizations develop effective, accurate, and meaningful reporting on sustainability and ESG. In some cases, they will need to top up their skills related to various environmental matters, such as greenhouse gas emission calculations. All of this simply spells ‘opportunity’ for students and recent graduates.”

Wang notes that many CFOs and other financial professionals are worried about the impact of ESG reporting and the emerging regulatory requirements, which will force organizations to focus on data in areas never focused on before, such as the different scopes for emissions. He believes that companies need to implement a series of systematic internal controls for ESG as requirements for assurance continue to evolve.

Jana Utter, Vice President of Enterprise Risk Management (ERM) for Centene Corporation, a leading healthcare enterprise headquartered in St. Louis, led a session on the intersection of risk and sustainability. Utter shared that, in her view, ESG naturally falls into the risk management area. She also shared her experience of leading her company through identifying potentially material ESG risks many years ago.

Utter said, “We realized that we were already doing many activities that fell under one or more of the letters in the acronym ESG, so we focused on identifying the initiatives that could be tagged to E, S, or G and developed Corporate Sustainability and ESG pages on our website.”

Emerging risk reports developed by Utter and her team continued to expand as ESG-related topics continued to surface in areas like executive pay transparency, diversity, equity, inclusion, and governance-related issues, such as board refresh and shareholder rights. In 2019, Centene looked for someone to take responsibility for exploring the growing focus on ESG and determine how to address in a holistic manner and Utter was the perfect candidate.

Utter and Hirth also emphasize the tremendous value of the COSO Framework to provide guidance in bridging the gap between ERM and ESG.

Utter encourages students to explore careers in ERM or ESG reporting and disclosures, stating that the field is both vast and expanding. ESG has the potential

to create substantial amounts of opportunity and value for organizations in demonstrating effective management inclusive of ESG-related risks. Getting involved with ERM or ESG means getting involved with a company’s operations and strategy to better understand the contextual relevance of the various topics that live beneath the ESG umbrella.

Kraemer also encouraged current students to be strategic in positioning themselves for future careers by considering opportunities in accounting, finance and ESG reporting.

“To generate a great return, you need great people. Without them, you cannot succeed,” Kraemer said. “Your generation demands that a company be socially responsible and that we think about the environment and social issues.”

The next IBA Forum on Accounting and Finance Analytics will take place on Friday, September 29, 2023, at the Kelley School of Business. The topic will be artificial intelligence and its role in accounting and finance.

“To generate a great return, you need great people. Without them, you cannot succeed,”

Harry Kraemer

2022 Accounting Alumni & Friends Recognition Banquet

The Accounting Alumni & Friends Recognition Banquet, sponsored in 2022 by Crowe, EY, Forvis, KPMG, and PwC, was created in 2016 as an opportunity to recognize the outstanding accomplishments of IU's accounting alumni.

"We have so many successful accounting alums," says Professor Joe Schroeder, PwC Faculty Fellow. "Each year we look forward to celebrating the many alumni who have had huge impacts in society and beyond."

The **Four Under Forty** award recognizes younger Kelley accounting alumni who have demonstrated a high level of excellence in their early careers and have the potential to make a lasting impact in their professional endeavors. Winners included Ashley Christie (BS 2007, MBA 2008), Partner with Katz Sapper & Miller; Jack Kienzler (BS 2008, MBA 2009), Finance Leader at Cummins Filtration; Bill Knerr (BS 2003), Partner with EY; and Brittney Kocaj (BS 2007), Partner at Crowe.



Ashley Christie &
Joe Schroeder



Jack Kienzler &
Joe Schroeder



Bill Knerr &
Joe Schroeder

Christie says that the coursework exposed her to technical tax concepts that shaped her career trajectory. "The field experience at Belgacom in Brussels was incredible and opened me up to other cultures and instilled my love of international travel," she says.

Kienzler credits Kelley for teaching him the invaluable soft skills required to be successful in the real world. These include participating in cases, team projects, mock interviews, and networking opportunities in both

undergraduate and graduate experiences. "Forcing students to be comfortable in uncomfortable situations is the best training one could receive in life," says Kienzler. "These experiences shaped my career success."

Other award winners felt the same.

"Part of what keeps me excited about my profession is showing up every day and solving problems," says Knerr. "The coursework and professors at Kelley prepared me to excel at problem solving throughout my career."

But it's not all about the studies. Kocaj (BS 2007) remembers fondly the classmates and friends she made through the Kelley School of Business.

"I especially enjoyed the Women in Business (WIB) group, which provided networking and educational opportunities designed for women," says Kocaj. "The friendships I made and the lessons I learned in WIB and at Kelley propelled me into a successful and fulfilling career in public accounting."

The **Community Service** award recognizes accounting alumni of Kelley who are making a tremendous impact on the world and exhibit exemplary generosity through community service and/or philanthropy. Winners were David Feinberg (BS 1998), Director at Crowe LLP and Darrell Gilmore (BS 1984).

"What was so impactful about my education at IU and in the Kelley School were all of the experiences I had exposing me to various disciplines," says Feinberg. "Accounting resonated with me and I felt would best provide me future opportunities. The foundation I received at IU opened the doors for everything that has followed



David Feinberg & Brian Miller

and has allowed me to pay it forward to my community!”

Gilmore, retired from Cargill, has volunteered extensively with Habitat for Humanity. He helped build 60 homes, restored 36 homes, and logged 1,237 volunteer hours in 2017 alone.

The **Outstanding Friend of Kelley** award recognizes an individual who has made a tremendous impact on both the Department of Accounting and the Kelley School of Business. Nominees are not required to be Kelley alumni. Mark Sullivan, Managing Principal of the Grant Thornton (GT) Chicago office, received the award.



Mark Sullivan & Pat Hopkins

“My favorite memory of many years at IU, in addition to writing my last tuition check, was when the Deans of Kelley, Luddy and O’Neill, told me that GT IDEA (Institute for Data Exploration for Risk Assessment and Management) had brought the three schools together to serve students and create opportunities for faculty to work together in a way that had not been done before,” says Sullivan.

The **Lifetime Achievement** award, which recognizes a Kelley accounting alumnus who has shown extraordinary leadership throughout his or her professional career and who has distinguished his or herself by achieving a consistently high level of excellence, went to Kathy Pawlus (BS 1982), retired partner with EY.

The **Professional Excellence** award recognizes those Kelley accounting alumni who have demonstrated a high level of excellence in their careers and are making lasting and ongoing impacts in their professional endeavors. Winners included Julie Adams (BS 1989), CEO of Oliver Winery; Brad Rachmiel (BS 1993), Managing Director at Protiviti; and Robert Tockman (BS 1984), Partner and Chief Accountant at KPMG.



Julie Adams &
Sonja Rego



Brad Rachmiel &
Sonja Rego



Robert Tockman &
Sonja Rego

Adams maintains that her accounting education at the Kelley School was instrumental in her career. “The integrative nature of the curriculum gave me a great deal of practice with how cross-functional teams drive value

across a business, paired with a super strong technical accounting foundation,” says Adams. “In addition, I believe that the real reward in any career comes from helping teams do their best work, and Kelley set me up well for this.”

Rachmiel notes that during his career, he held jobs in auditing, finance, supply chain, and sales. “Having an accounting degree from Kelley gave me the tools to pivot from one discipline to another,” he says. “Accounting is truly the language of business, and there’s no better place to learn that language than right here in Bloomington!”

Tockman insists that the dedication of everyone involved in the accounting program and the quality of the program were the key to his successful career. “It’s about more than just the teaching of accounting,” says Tockman. “It’s about the breadth of the program, the focus on critical thinking and teamwork, and the commitment to excellence demonstrated by all involved. IU builds a foundation of success.”

Finally, each year the Department of Accounting gives out an **Academic Excellence** award to recognize an alumnus of Kelley (PhD program or other Kelley programs) that has made a tremendous impact on teaching, service and research in accounting. The department chose to bestow a posthumous award to Joe Kramer, Jr. (DBA, 1963), former professor and Associate Dean. Kramer was the ninth African-American person to earn a PhD in accounting and one of the first black CPAs.



Joe Kramer, Jr.

“Joe Kramer is a pioneer in that regard,” says Schroeder.

Kramer, a tenured full professor at Penn State and later Howard University, was a prolific researcher who was published in top journals such as The Accounting Review. Throughout his career, he worked with the American Institute of Certified Public Accountants (AICPA) and the American Accounting Association, supporting initiatives to help underrepresented minorities become successful in the accounting profession. Kramer passed away in the 1980s.

“When you sit back and look at people who have had a profound effect on the academic profession, particularly for black accountants, you think of Joe Kramer and then realize he graduated from IU and had such a profound impact in his field!” says Schroeder. “We’re so proud that he’s a Kelley IU alum.”

If you would like to nominate an IU alum for an award for the 2023 Accounting Alumni & Friends Recognition Banquet, please send your nomination to Sonja Rego (sorego@indiana.edu) or Joe Schroeder (jhschroe@indiana.edu).

New Experimental Course Set to Launch on Sustainability Reporting and Analysis

by Christy Heitger-Ewing

Last year, Professor Katie Metz was teaching Global Accounting Analysis, a 1.5 credit hour post-requisite to a global management course. Metz, who has an international tax background, started teaching a couple of new modules about Environmental, Social, and Governance (ESG) and sustainability reporting because ESG is becoming a much bigger factor in financial analysis and investment decisions.

"I started diving into the ESG piece because I thought it was something that my students needed a baseline idea of," says Metz. "It got to where 50 to 60% of that class was ESG and sustainability reporting, which my students loved."

In fall of 2022, Professor Bree Josefy and Professor Terry Campbell organized a forum on ESG reporting in accounting and finance analytics. (See article on pages 10–11.) Following the event, Josefy and Metz proposed creating a full three-credit hour course devoted to sustainability reporting and analysis.

"It's a huge area of focus right now!" says Metz. "Our corporate partners and their clients are increasingly requesting baseline knowledge in that field. We thought it was a 'hot topic' at first, but it's definitely here to stay."

This fall the Department of Accounting will offer A355 Sustainability Reporting and Analysis, a full semester experimental elective course taught by Metz. The department plans to offer at least two sections of the class each year.

"We designed the class to make it accessible and approachable to a variety of interests and skill levels," says Metz, noting that it's also an elective in the sustainable business and international business co-majors, making the topic available to accounting interested non-accounting majors.

A355 is a survey-level course in that it covers a wide variety of sustainability reporting and analysis topics at a level which most students can understand. The goal of the course is to provide students with a framework for sustainability reporting at both the U.S. and the multinational level and to help them identify how various stakeholders interact with sustainability reporting. Metz wants to help students understand and evaluate the differences in sustainability reporting and traditional

financial reporting but also comprehend the intersection of those two.

"This class will be based on real application of sustainability reporting concepts, as well as the intersection of tax, assurance and advisory in sustainability reporting," says Metz. "We'll take a deep dive into companies themselves and how they're interacting with sustainability reporting."

Metz also wants students to understand the nature of the sustainability reporting landscape and how rapidly, and perhaps controversially, it changes. With her

background in international tax policy, Metz is used to a landscape that's changing constantly. She wants to teach her students to adapt to that changing landscape and perhaps to even embrace it.

"I want students to understand the challenges in regulating this reporting activity and why it's the Wild West right now," says Metz. "I think it's one

of the most compelling and fun components of the topic."

Metz anticipates ample interest in A355 since Gen Z is so conscious of these issues.

"Our students are naturally thinking about sustainability topics, especially climate and environment, but sustainability reporting isn't just about the environment. It's also about social issues, diversity initiatives, labor laws, governance, and so many other topics," says Metz. "Our students are perhaps more keenly aware of these issues than prior generations, and that natural inclination towards interest and awareness in these topics intersecting with a recognition they can make these topics part of their career, is huge."

If you are an alumnus or corporate sponsor who is involved in ESG and would like to connect with Professor Metz, email her at kmetz@indiana.edu.

"Our corporate partners and their clients are increasingly requesting baseline knowledge in that field. We thought it was a 'hot topic' at first, but it's definitely here to stay."

Katie Metz



Department of Accounting Retreat

For more information on faculty and department news, check out the Department of Accounting Blog!
accountingblog.kelley.iu.edu/



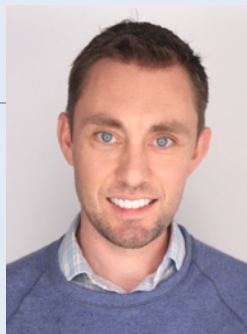
November 2, 2023!!

Join the Department of Accounting Faculty, Alumni and Sponsors as we recognize Alumni Awardees at the **Alumni Banquet.**



Faculty Highlights

New Faculty



Spencer Anderson



Nargess Golshan



Spencer Anderson

Spencer Anderson joins the Kelley school from the University of Illinois at Urbana-Champaign where he was an assistant professor. The department will be familiar to Anderson, who earned his PhD in accounting here at the Kelley School of Business in 2016. His research centers on how investors respond to the reporting resulting from financial accounting standards. He will teach the undergraduate Accounting Research course at Kelley.

Anderson and his wife, Stacie, are excited to rejoin the Bloomington community with their three children, Izzy (9), Daphne (7), and Henry (4).

"I'm thrilled to join the faculty at IU," says Anderson. "My experience in the PhD program here was incredible, and the chance to be a part of the outstanding Department of Accounting here is a dream come true."

Nargess Golshan

Nargess Golshan joins the Kelley faculty from the University of Kentucky, where she was an assistant professor of accounting. Originally from Iran, she completed her bachelor's degree in applied mathematics at Shahid Beheshti University. Prior to completing her PhD at the University of Missouri, Golshan worked in the Kuala Lumpur office of Amec Fosterwheeler, where she oversaw the firm's training and development projects for consulting clients in Southeast Asia.

"My research centers on understanding the drivers and outcomes of disclosures, as well as the dynamics of the auditing industry," says Golshan. "Leveraging cutting-edge machine learning and deep learning techniques, I strive to reveal insights into firms' disclosures that may not be easily perceptible to human readers or listeners."

"I enjoy running and exploring new places through travel, gaining inspiration and insights for my work along the way," says Golshan, who also enjoys hiking with her husband, Will.

New Faculty



David Volant



Ryan Johnson



Greg Burke

David Volant

David Volant joins the Kelley-Bloomington faculty from the University of Iowa, Tippie College of Business, where he recently graduated with his PhD in accounting. His research sheds light on how corporate executives convey information to stakeholders, how corporate disclosure sets investor expectations, and the corresponding impact on information on security prices.

"I'm grateful for the opportunity to join Kelley," says Volant. "The researchers here are world-class, and I'm looking forward to being part of the overall Kelley ecosystem. Being on faculty will be a big change of pace from my time at Iowa, but I'm thrilled for the next phase of my career."

Volant grew up in Phoenix, Arizona, and received his undergraduate degrees in accounting and finance at Arizona State University before moving to the Midwest for his Doctoral studies. Volant enjoys meal-prepping and is eager to try the many restaurants Bloomington has to offer.

Ryan Johnson

Ryan Johnson joins the Kelley School of Business from the doctoral program at the University of Georgia. Johnson's primary research interests include managers' voluntary disclosure choices, non-GAAP reporting, and executive compensation.

"Joining the Kelley School of Business is an excellent opportunity to further the research I started during my doctoral program at the University of Georgia," says Johnson. "I'm excited to transition to the Kelley School of Business and work with some of the top researchers and students in the country."

Johnson and his wife, Nathalie, enjoy trying new foods and going to parks with their four children, Adaline (7), Gordon (5), Lincoln (2), and Gwendalyn (born March 2nd of this year). They are looking forward to exploring the walking/biking trails around Bloomington, attending some IU basketball games, and visiting the Indianapolis Children's Museum they have heard so much about.

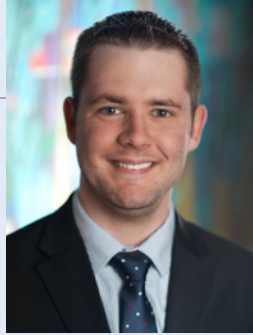
Greg Burke

Greg Burke joins the Kelley Department of Accounting as a visiting assistant professor from Duke University, where he completed his doctoral studies. Before starting his career in academia, Burke was an auditor for PwC in Boston where he worked on asset management and employee benefit plan engagements

His teaching experience spans financial and managerial accounting as well as mathematics. In terms of research, Greg studies the capital market consequences of securities regulation, financial reporting and disclosures, and corporate governance.

"I'm looking forward to furthering my research agenda with the world-class team of accounting scholars at Kelley," says Burke. "Outside of academia, I enjoy getting outside, doing a good DIY household project, and finding an unbeatable sale."

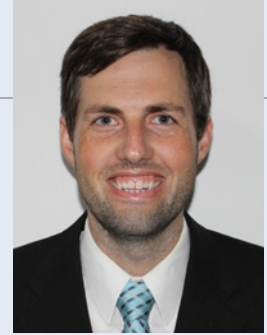
New Faculty



Jerry Mathis



Melanie Millar



Jeff Clark

Jerry Mathis

Jerry Mathis joins the Kelley-Bloomington faculty as a visiting assistant professor from the Olin Business School at Washington University in St. Louis. During his time at Olin, Mathis taught courses on financial and managerial accounting, as well as corporate and individual tax. In his current research, he examines the role of mandatory and voluntary disclosure in price formation, as well as the use of non-traditional information sources in analyst forecasting.

"I'm excited to join the Kelley faculty, all of whom are well-known as exceptional researchers and teachers," says Mathis. "I can't wait to get started."

Outside of work, Mathis is happily married to his husband, Eric, and is a proud dog dad of their Australian Shepherd, Oliver. When not wrangling the high-energy pup, he also volunteers his time to financial literacy programs and to mentoring first-generation college students.

"As a first-gen student myself, I attribute much of my ability to succeed in business and academia to the exceptional professors I had early in my college career," he says. "Being able to give back in that way is the most satisfying part of my job."

Melanie Millar

This fall Melanie Millar joins the department as a visiting assistant professor at Kelley. She'll teach auditing courses, drawing from her five years of experience at Johnson & Lambert Co. LLP where she audited public property and casualty insurance companies and not-for-profit organizations.

"I'm excited to collaborate with Kelley's incredible group of faculty," says Millar, who is originally from Virginia. "My research fits really well with several Kelley faculty."

Millar was previously a faculty member at Baylor University. She loves to travel, whether it's a day trip to a nearby museum or an international trip to experience a new culture. When she's not in the classroom or working on research, you'll probably find her reading a Mark Greaney novel or kicking around a soccer ball.

"I can't wait to explore my new home in Bloomington," says Millar. "I'm particularly looking forward to finding my new favorite Asian restaurants!"

Jeff Clark

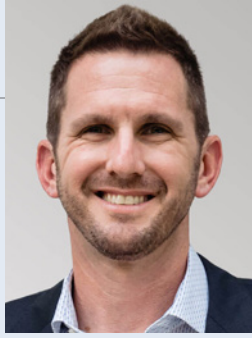
Jeff Clark will be transitioning into the role of clinical assistant professor after being a Visiting Assistant Professor at Kelley for the past two years. Prior to joining IU, Clark was an Assistant Professor at Nanyang Technological University in Singapore. Clark will continue to primarily teach managerial accounting courses.

"During the past two years, I've loved teaching the energetic students at Kelley," says Clark. "I'm excited for the opportunity to continue to learn with them in the future and to collaborate with my great colleagues."

Clark and his wife, Madison, along with their two children, Ellie (9) and Owen (6), have loved being in Bloomington for the past couple of years. On the weekends, they are often enjoying youth sporting events or hiking the many trails Monroe County has to offer.



Will Demeré



Brett Levitt

Will Demeré

Will Demeré joins the Kelley School of Business from the University of Missouri, where he was an assistant professor of accountancy and the RubinBrown Faculty Scholar. Demeré received his PhD from Michigan State University and his BS and MACIS from Virginia Tech. Prior to starting his PhD program, he also worked as an external auditor at Deloitte and as an instructor in the Accounting & Information Systems Department at Virginia Tech.

As a clinical assistant professor at Kelley, Demeré will be teaching data analytics and auditing.

"I'm excited about working with students and faculty at Kelley to advance the data analytics emphasis within the department to prepare students for their future professional roles," says Demeré, who has previously taught courses in auditing, data analytics, managerial accounting, and financial accounting. He's also worked with study abroad programs, teaching in France, Germany, and Belize.

Demeré enjoys spending time with his wife, Nargess, and their Australian Shepherd, Oscar. He also likes traveling, running, rock climbing, and participating in Microsoft Excel Esports competitions.

Brett Levitt

Brett Levitt, who has been an adjunct lecturer this past year, will be transitioning to a permanent role this fall as a lecturer. In his new role, Levitt will continue to teach A313: Introduction to Careers in Accounting as well as an experiential learning course within the GAP program.

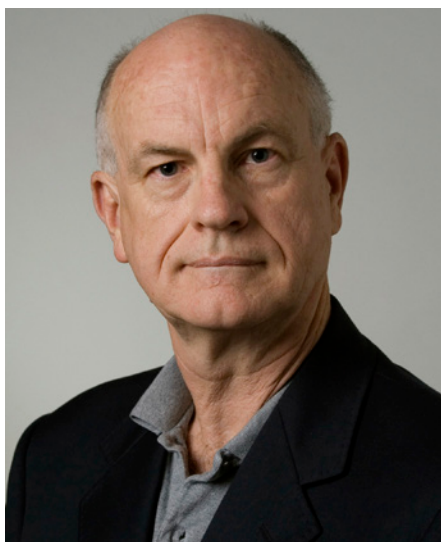
"I'm thrilled to be transitioning to a full-time role that will allow me to work with more students," says Levitt, who received his bachelor's degree in accounting and MBA from Indiana University in 1999. He started his professional career in management consulting at Ernst & Young in St. Louis, focusing on telecommunications companies. He later joined his family's manufacturing business in Orlando, Florida.

Levitt is an avid cyclist who loves to travel the world with his wife, Lori, and their two daughters, Jordan (20) and Zoe (15).

"I couldn't be more excited to continue my journey from a Kelley undergrad to Kelley 3/2 MBA to joining the great Department of Accounting at Kelley," says Levitt.



Terry Campbell Retires



Dr. Terry Campbell grew up on a pig farm not far from Salem, Indiana. His first venture in lifelong learning was in a one-room schoolhouse with a potbellied stove and outhouses for the students and teacher. All eight grades were taught in one room, and Campbell learned every lesson, for every grade, every day. After high school, he joined the military where he demonstrated a knack for languages, eventually learning Russian.

"In the 60s, the Russian economy seemed to have more long-term potential," says Campbell. He became one of the last Cold War warriors working closely with the CIA and other intelligence agencies.

After the military, Campbell went back to school at Southern Illinois University and in the late 1970s became a PhD student at Indiana

University studying economics. One night he woke up with the realization that the demand curve for an economist was horizontal while the demand curve for accountants was vertical, so Campbell double-majored in accounting and business economics.

After a few years at Penn State University, Campbell joined the faculty at the International Institute for Management Development (IMD) in Lausanne, Switzerland. At IMD Campbell began working for executives and companies around the world, often flying 500,000 to 600,000 miles a year.

"For eight years, I flew once a month to Dubai," says Campbell. "After 8+ years of monthly trips to Dubai and more than 60 trips to the Peoples Republic of China, the Swiss Air people came back to meet me during one flight because they had never met a passenger who flew more than the crew."

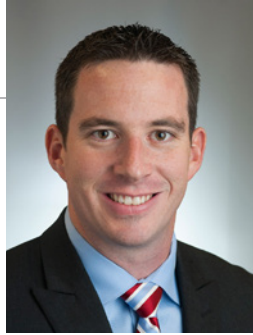
In Switzerland, business disciplines are integrated with strategy, and faculty are expected to work together, often with three team-teaching a course. During one course that Campbell was team-teaching, the other faculty wasn't able to teach their session and one of the student teams experienced significant conflict. These students were corporate executives who were paying thousands of dollars a day to learn from a faculty that did not understand how differences in individual judgement and perception impact team dynamics. Campbell walked out of that classroom and told his colleague, "That's the last time that's happening. I'm going to know

this Myers Briggs stuff well enough that I can do it." And so he became Myers Briggs certified. Eventually Campbell was accepted to the American Psychological Association and was a member for more than 20 years. He was one of the only members that was a certified public accountant and the only member with a PhD in accounting.

In the early 2000's, Campbell considered retiring, but then he spoke with Joe Fisher, who was then Chair of the Department of Accounting. Campbell was in Kuala Lumpur and was going back and forth with Fisher, who suggested that perhaps Campbell teach at the Kelley School of Business. Campbell joined Kelley in 2008 and became best known by students for teaching A509 Career Success Skills and A505 International Field Studies in the Graduate Accounting Programs (GAP). During his professional career, Campbell built a global network of business contacts, which enabled him to send 25 students to Chengdu, China, during the first spring he taught A505. Thanks to Campbell, GAP now has a large and diversified portfolio of international field study locations, which allows students to live and work for seven weeks in places such as Vietnam or Bucharest, Romania.

Over the course of his career, Campbell believes he has worked in every country in the northern hemisphere, except for North Korea. Campbell, who now splits his time between Orlando, Florida, and Lausanne, Switzerland, with his wife, Linda, has unquestionably led a life of continuous learning.

Faculty Promotions



Joe Schroeder



Bridget Stomberg



Chris Cook

Joe Schroeder Promoted to Full Professor

In April 2023, Joe Schroeder was promoted to Full Professor. This career milestone wasn't on the radar when he joined the Accounting Department as an assistant professor in 2013. Since then, Schroeder has accomplished many things from award-winning research to teaching in various Kelley programs.

"This year marks a decade at Kelley and has caused me to reflect on all the amazing people I've had the chance to work with at IU and beyond," says Schroeder, who currently serves as an editor for *The Accounting Review* and *Auditing: A Journal of Practice and Theory*.

In 2020, he was the recipient of the AAA/Deloitte Wildman Medal, which recognizes research that has made a significant contribution to the practice of public accountancy.

In August 2023, Schroeder was appointed as Faculty Chair of the Graduate Accounting Programs, which just celebrated their 25th graduating classes for the 3/2 MBA and MSADA programs.

"Our programs are among the best in the nation due to the dedication of the leadership before me," says Schroeder. "I'm passionate about these programs and humbled to have the opportunity to keep this tradition going."

Bridget Stomberg Promoted to Full Professor

The best piece of advice Bridget Stomberg has received is that hope is not a strategy. "You can't hope things will turn out the way you want them to," she says. "You must take action to achieve your goals."

That she has. Stomberg, who joined the IU faculty in 2017, is proud of the work that the Accounting DEIB (Diversity, Equity, Inclusion, & Belonging) Committee has completed in the last year.

"I'm proud that our committee has implemented change—spotlighting our diverse faculty, students, and alums, delivering workshops on inclusive teaching practices to our faculty, and programming new events for students."

In August 2022 Stomberg was appointed as Faculty Chair of the Kelley Undergraduate Program. Her teaching and research focuses on income taxation, and she enjoys helping students realize the importance of taxes in their everyday lives.

"Many students come into class perceiving taxes as boring and irrelevant," says Stomberg, who enjoys the challenge of getting them to appreciate how important taxes are to business decisions and how much the success or failure of a project can rest on a company's grasp of the tax considerations.

Chris Cook Promoted to Teaching Professor

We all have complaints in life, but adversity can dramatically change one's perspective.

"When your mother is sitting at the kitchen table every night doing her homework trying to get through her undergraduate and master's degrees before you graduate from high school so the family only has one college bill at time, you learn quickly to complain a little less and work a little more," says Chris Cook, a 13-year IU accounting faculty who was just promoted to Teaching Professor.

Cook, who has a passion for new business creation in developing countries, has thoroughly enjoyed his time at IU, calling his students the most gratifying part of the job. "They bring an energy to class that's infectious," he says.

But the field of accounting, in general, is exciting. "Our clients never have normal, boring problems," says Cook. "If it was easy, they would fix it on their own. When a client calls with an issue, it will be anything but a boring day at the office."

He loves the fact that he and his colleagues spend a lot of time working with people outside the accounting/finance silo.

Faculty Highlights



Julie Head

Julie Head Promoted to Teaching Professor

No one had to twist Julie Head's arm to get her to join the IU faculty in 1992. An IU alum, she fell in love with the Bloomington campus long ago. Head first discovered she had an interest in accounting after taking an introductory financial accounting class during her sophomore year (the same class she's currently teaching at Kelley).

"I've always loved games, and working in accounting felt like a puzzle to be solved," says Head, who in the last 31 years has taught tens of thousands of students in the "jumbo" introductory accounting classes (A100, A201, A200, A304) as well as in upper-level courses. She also taught an accounting course for lawyers at IU's Maurer School of Law.

Prior to joining IU, Head spent ten years working in public accounting as an auditor for Coopers & Lybrand (PwC) and KPMG. Head helped to develop work-life balance policies at KPMG after being one of the first women to be promoted to Audit Manager at her KPMG office. She later negotiated a flexible workload after becoming a mom; this was the first arrangement of this type in the southwest region for KPMG.

"I'm proud of helping to establish some of the initiatives that now benefit my students who join the profession," says Head.

A licensed CPA as well as a CGMA, Head values the opportunities she has had to share her teaching experience with new faculty as well as PhD and MBA students who serve as teaching assistants in her jumbo classes.

"Mentoring is another form of teaching, and I love both accounting and teaching!" says Head, Fettig/Whirlpool Distinguished Lecturer.



Brian Miller

Brian Miller Becomes Associate Faculty Chair of the MBA Program

Brian Miller, Sam Frumer Professor, has been part of the Indiana University Kelley School of Business since 2008, but in 2017 he started working with MBA students by doing GLOBASE projects in Indonesia.

"This made me really fall in love with this student group that had come from such diverse backgrounds and have so much to offer the world," says Miller. He got even more deeply involved with MBA students and the MBA program when, in 2019, he was honored to take the reins of the MBA Core accounting course passed down from Emeritus Professor Jamie Pratt. John Hill took over leadership of the MBA program in January 2023 and asked Miller to join him as Associate Chair. Miller was thrilled as the position aligned beautifully with his passions.

"We face tremendous challenges in the full-time MBA program, where enrollments nationwide have been in a constant decline," says Miller. "Without a doubt our top priority every day is attracting and retaining the very best students to show them the impact that a Kelley MBA can have on them."

In his new role, Miller is working primarily on strategy and development. More specifically, he continues to improve the program's curriculum, ensure they are effectively communicating the benefits of the program, and determining if there are ways to be more strategic in partnering with the amazing Kelley Direct (KD) MBA Program.

"I'm most excited about this opportunity because it brings me closer to the students I love working with," says Miller.

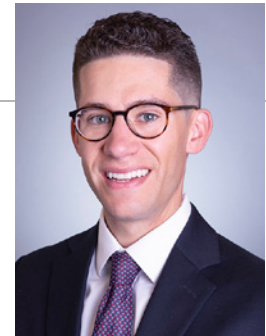
PhD Placement



Brittani Shantel Jackson



Anish Sharma



Stefan Richter

Brittani Shantel Jackson

Before joining the accounting faculty at Western Michigan University this fall, Brittani Shantel Jackson earned her Bachelor's degree in accounting from Michigan State University, her Master's degree in accounting from Wayne State University, and her PhD in accounting from Indiana University. Prior to pursuing her PhD, Jackson was an auditor at PwC (Detroit) in the private company services sector. She also taught accounting at the University of Toledo as a visiting instructor.

"I am grateful for the opportunities experienced at Indiana University," says Jackson. "I'm excited to leverage the knowledge, guidance, and support provided by the IU faculty as I pursue my passion of increasing the accounting pipeline through my teaching, research, and service efforts."

Jackson's research interests focus on understanding how investments in internal controls, accounting, and auditing can benefit small businesses. She is also interested in the implications of auditing and financial accounting standards on public and private firms. Her teaching interests focus on auditing and financial accounting.

Anish Sharma

Anish Sharma earned a Bachelor of Accountancy and a Master of Accountancy from the University of Mississippi. Before the PhD program, Sharma worked for three years in public accounting at Deloitte in Dallas, Texas. He worked in the asset management group and audited hedge funds, private equity funds, and mutual funds. Anish recently earned his PhD in Accounting at Indiana University.

"My research interests primarily focus on the determinants and consequences of disclosure that can inform policy decisions," says Sharma. "In my dissertation, I examine whether an increase in the transparency of financial advisers' disciplinary history reduces their likelihood of engaging in future misconduct. My teaching interests are in financial accounting."

Sharma will be joining the faculty at the University of Georgia and is eager to move back to the southeast and attend SEC football games again.

"I have greatly enjoyed my time in Bloomington and I'm extremely thankful for the mentorship and support from the faculty. I truly believe there was no better PhD program for me to serve as the foundation for my academic career."

Stefan Richter

Stefan Richter grew up in the suburbs of Pittsburgh, Pennsylvania. He attended Penn State for his undergraduate studies, earning a Bachelor's and Masters in Accounting. Richter then went on to work in public accounting and as a manager in the tax department of a public company in the Washington, D.C., area for five years. Most recently, he earned his PhD in Accounting at Indiana University.

"I'm extremely excited to join the terrific faculty at the University of Illinois Urbana-Champaign and to continue my career at another Big 10 school," says Richter. He is exceptionally grateful for the guidance and support from the IU faculty and the Kelley School of Business. "I could not have achieved this success without the tremendous faculty in the Accounting Department."

Richter's research interests include examining firms' disclosures about tax incentives and understanding the effectiveness of tax policy. His dissertation examines firms' incentives for disclosing a COVID-era tax credit that revealed to corporate stakeholders the extent to which firms assisted employees during the pandemic. His teaching interests consist of individual and business income taxation.

Department of Accounting Teaching, Research, and Service Highlights

Faculty Teaching and Service Awards

Brian Grant received the Kelley School of Business Panschar Undergraduate Teaching Award for Associate Instructors.

Brian Miller received the Walt Blacconiere MBA Teaching Award.

Bridget Stomberg received the Department of Accounting DEIB Contributions Award and the Outstanding Faculty Award from the Master of Science in Accounting and Data Analytics program.

Jeff McMullin received an Department of Accounting Teaching Achievement Award.

John Wertz received the “Most Engaging” Teaching Award from Alpha Kappa Psi.

Julie Head received an Department of Accounting Teaching Achievement Award and was nominated for the “Legacy” Teaching Award by Alpha Kappa Psi.

Katie Metz received the Department of Accounting Rising Leader Award and the Kelley School of Business Panschar Undergraduate Teaching Award for Non-Tenure Track Faculty.

Lori Bhaskar received the Department of Accounting Service Award.

Lori Bhaskar, Jason Brown, Fred Coleman, Dave Greene, and Brett Levitt received the Kelley School of Business Innovative Teaching Award.

Lori Bhaskar, Joe Burke, Jeff McMullin, and John Wertz received Indiana University Trustees Teaching Awards.

Mike Healy and **Brett Whitaker** were nominated for the “Best Addition” Teaching Award by Alpha Kappa Psi.

PJ Hoffman was nominated for the “Beyond the Grade” Teaching Award by Alpha Kappa Psi.

Faculty Research Publications and Acceptances

Brian Miller and **Eric Holzman**, “Discussion of ‘Reporting Misstatements as Revisions: An Evaluation of Managers’ Use of Materiality Discretion,” *Contemporary Accounting Research*, forthcoming.

Brian Miller, Eric Holzman, and Brady Twedt, “Curbing Enthusiasm: Media Sentiment and the Disciplining Role of Quarterly Earnings Announcements,” *The Accounting Review*, forthcoming.

Chad Ham, Z.R. Kaplan, and S. Utke, “Attention to Dividends, Inattention to Earnings?” *Review of Accounting Studies* 28: 265-306.

Daniel Beneish and D.C. Nichols, “Identifying Overvalued Equity,” *Review of Financial Economics*, forthcoming.

Daniel Beneish, David Farber, M. Glendening, and K.W. Shaw, “Aggregate Financial Misreporting and the Predictability of U.S. Recessions and GDP Growth,” *The Accounting Review* 98(5): 1-32.

Donnie Young, J. Johnson, J. Theis, and A. Vitalis, “Greenhouse Gas Emissions and Disclosures: Insights and Questions,” *Accountability in a Sustainable World Quarterly*, forthcoming.

Donnie Young, J. Johnson, J. Theis, and A. Vitalis, “Your Emissions or Mine? Examining How Emissions Management Strategies, ESG Performance, and Targets Impact Investor Perceptions,” *The Journal of Sustainable Finance and Investment*, forthcoming.

Eric Holzman, N. Marshall, and B. Schmidt, “When Are Firms on the Hot Seat? An Analysis of SEC Investigation Preferences,” *Journal of Accounting and Economics*, forthcoming.

Geoff Sprinkle, Jason Brown, P. Martin, and D. Way, “How Return on Investment and Residual Income Performance Measures and Risk Preferences Affect Risk-Taking,” *Management Science*, Forthcoming.

Greg Geisler and Bill Harden, “Maximizing Tax Alpha in Both Accumulating and Decumulating Retirement Savings,” *Journal of Financial Service Professionals* 77(2): 46-58.

Joe Burke, Donnie Young, K. Towry, and J. Zureich, “Ambiguous Sticks and Carrots: The Effect of Contract Framing and Payoff Ambiguity on Employee Effort,” *The Accounting Review* 98(1): 139-162.

Joe Schroeder, Ken Merkley, J. Gao, and J. Pacelli, “Internal Control Weaknesses and the Demand for Financial Skills: Evidence from U.S. Job Postings,” *The Accounting Review* 98(3): 203-228.

Joe Schroeder, K. Chapman, M. Drake, and T. Seidel, “Earnings Announcement Delays and Implications for the Auditor-Client Relationship,” *Review of Accounting Studies* 28: 45-90.

Ken Merkley, B. Coleman, and J. Pacelli, “Human Versus Machine: A Comparison of Robo-Analyst and Traditional Research Analyst Investment Recommendations,” *The Accounting Review* 97(5): 221-244.

Ken Merkley, M. Dantas, and F. Silva, “Government Guarantees and Banks’ Income Smoothing,” *Journal of Financial Services Research*, forthcoming.

Ken Merkley, P. Choudhary, and K. Schipper, “The Cost of Waiving Audit Adjustments,” *Journal of Accounting Research* 60(5): 1813-1857.

Lori Bhaskar, T. Majors, and A. Vitalis, “How Does Depletion Interact with Auditors’ Skeptical Dispositions to Affect Auditors’ Challenging of Managers in Negotiations,” *Contemporary Accounting Research*, forthcoming.

Sonja Rego, M. Hutchens, and B. Williams, "The Impact of Standard Setting on Individual Investors: Evidence from SFAS No. 109," *Review of Accounting Studies*, Forthcoming.

Sonja Rego, M. Hutchens, and B. Williams, "Tax Avoidance and Firm Risk: New Insights from a Latent Class Mixture Model," *The Accounting Review*, forthcoming.

Yadav Gopalan, S. Arif, J. Donovan, and A. Morris. "Pay for Prudence," *Journal of Accounting and Economics*, forthcoming.

Faculty Serving as Journal Editors and Editorial Board Members

Brian Miller is an associate editor at *Management Science* and an Editorial Board Member at *The Accounting Review* and *Review of Accounting Studies*.

Bridget Stomberg is an editorial board member at *The Accounting Review*.

Geoff Sprinkle is an editorial board member at *Accounting, Organizations, and Society* and *British Accounting Review*.

Jason Brown is an editorial board member at *The Accounting Review* and the *Journal of Management Accounting Research*.

Joe Schroeder is an editor at *The Accounting Review* and *Auditing: A Journal of Practice and Theory*.

Ken Merkley is an editor at *Journal of Business, Finance, and Accounting* and an editorial board member at *The Accounting Review*.

Lori Bhaskar is an editorial board member at *Accounting, Organizations, and Society*, *Auditing: A Journal of Practice and Theory*, and *Accounting Horizons*.

Marcy Shepardson is an ad hoc editor at *Auditing: A Journal of Practice and Theory* and an editorial board member at *Accounting Horizons*.

Pat Hopkins is an editor at *The Accounting Review*.

Sonja Rego is an editor at *The Journal of the American Taxation Association*.

Yadav Gopalan is an editorial board member at *The Accounting Review*.

Other Scholarly Awards and Activities

Brian Miller will be the keynote speaker at the Accounting Exemplar Award Luncheon at the 2023 AAA Annual Meeting.

Bridget Stomberg received an Outstanding Reviewer Award from *The Accounting Review*.

Bridget Stomberg and **Katie Metz** delivered a series of inclusive classroom teaching workshops to the Department of Accounting and Kelley School.

Daniel Beneish received the Kelley School of Business Distinguished Career Research Impact Award and an Accounting Kelley School of Business Research Award.

Donnie Young received a research grant from the *Access to Audit Personnel Program* sponsored by the Center for Audit Quality and the American Accounting Association.

Greg Geisler received the 2022 Montgomery-Warschauer Award for the most outstanding contribution to the betterment of the financial planning profession.

Joe Schroeder received an Accounting Kelley School of Business Research Award.

John Wertz received an Excellence in Reviewing Award from the Financial Accounting Reporting Section (FARS) for the 2023 FARS Midyear Meeting.

Ken Merkley received an Accounting Kelley School of Business Research Award, an Outstanding Reviewer Award from *The Accounting Review*, and was appointed to serve as the Chairperson of the Financial Reporting Issues Conference for the Financial Accounting Standards Board (FASB).

Lauren Maines provided the keynote address at the Alliance Manchester Business School Doctoral Research Conference.

Leslie Hodder was reappointed to serve on the International Financial Reporting Standards (IFRS) Advisory Council. She was also elected to serve as the Vice President of Finance of the International Association for Accounting Education and Research (IAAER).

Lori Bhaskar, **Tim Mallon**, and **Geoff Sprinkle** received an Outstanding Paper Award at the 2023 Management Accounting Research Conference.

Sonja Rego received the Edmund Outslay Best Discussant Award for her discussion at the 2022 JATA Conference.

Tanya Carson earned an advanced graduate certificate in accounting analytics from the University of Connecticut in 2023.

Yadav Gopalan received an Accounting Kelley School of Business Research Award and he organized and hosted the 5th Annual IU/St. Louis Fed Workshop on Financial Institutions Research.

Graduate Accounting Programs

The 3/2 MBA and MSADA programs are national leaders in graduate accounting education. This is largely the result of the innovative chairs, directors, faculty, and staff who have worked tirelessly over the years to provide the best experiential learning curriculum possible. Seven years ago, Pat Hopkins (then GAP chair) asked Joe Schroeder to teach A514 Auditing Practice and Theory, in the first year core. Three years later, Joe was asked to teach Advanced Auditing for the MSADA and 3/2 MBA programs.

“Teaching in these programs is the best experience I have had at Kelley, and when asked to be the next chair I said ‘yes’ without hesitation as I believe in these programs and the successes they bring to our students,” says Schroeder. “I am humbled to be the next chair and incredibly grateful for the mentorship I have received from past chairs Pat Hopkins, Conrad Prebys Professor, and Leslie Hodder, David Thompson Chair, as well as all the faculty and staff in the program. I look forward to continuing the tradition of excellence for the next 25 years and beyond.”



Keeping it Real: A505/A569 Arms Students with Real-World, Hands-On Experience

by Christy Heitger-Ewing

Immersive, hands-on experience is where true skill-building happens. That’s precisely what the local Jim Grandorf Field Consulting projects (A569) and international Field Study projects (A505) are designed to do for Kelley Graduate Accounting Program (GAP) students. These courses enable GAP students to achieve real-world consulting experience using research-based strategies while serving a variety of organizations and businesses who could benefit from modifying their business models.

Mady Day (3/2 MBA) and her teammates Matt DuJardin (MSADA), Jonny Moses (3/2 MBA), and Ryan Sauter (MSADA) worked with Opendate, a startup live music management software that functions as a one-stop-shop for concert venues by managing the entire event lifecycle from artist discovery to final payout and filling “open dates” on customers’ event schedules. Opendate needed quantitative and qualitative data from its two current customers to pitch their value-add to prospective venues, and pro forma financial statements to find a breakeven point and capital requirements. To achieve this,

Day and her team formulated an ROI calculation and feature-focused competitor analysis to quantify Opendate’s sales pitch and emphasize the platform’s most valuable features. They also dynamically modeled complex assumptions over the next five years to observe how different inputs affect Opendate’s breakeven point (in terms of date achieved and customers needed) and required cash investment.

The project, with its broad scope of work, tested the team’s skills—from marketing to financial modeling. It also helped GAP students understand the multiple

perspectives of communicating a firm's value proposition to various audiences, both externally to attract new clients and internally to maintain stakeholders' confidence. Day acted as the main point of contact for their client and managed all communications, from scheduling meetings to managing scope expectations to organizing deliverables.

"This soft skill was ongoing throughout the duration of the project, allowing me to experience a real-life responsibility that no other class can offer," says Day, who was excited about what happened on presentation day when one of the investors told the team that he plans to use their pro forma model as the standard for all of his other business ventures.

"It was an honor to share real, value-added work with our client while also being selected as a finalist team among our talented 3/2 MBA and MSADA teams," says Day, who recently moved to Indianapolis to begin her career as an audit associate for FORVIS.

Mollie DeBrunner calls the course incredibly transformational as it allowed her to see where she could excel in a client interaction setting.

"This is a rare opportunity in an educational setting and speaks to the focus Graduate Accounting Programs places on developing well-rounded professionals," says DeBrunner, who worked with her team to help their client prepare a gap analysis related to their pursuit of a coveted ESG certification. They analyzed hundreds of operational elements of the business to prepare a go-forward strategy that would allow for certification attainment.

DeBrunner appreciated the degree of independence the team was afforded with the project.

"Our group was allowed to exercise a great deal of judgement in the way we wanted to approach the project and manage delivery which allowed us

to employ and refine our project management skills," says DeBrunner, who recently joined William Blair in their Chicago office as an investment banking analyst.

"I'll always appreciate the opportunity we were provided to engage with such a diverse group of business functions on a single project," says DeBrunner. "My team learned a lot about business operations at a higher level which can be applied in each of our careers moving forward."

Jordan Soderling was a consultant for Crane Naval Base whose mission was to improve their communications strategy. During the course, the biggest surprise Soderling encountered was seeing the disconnect among different employees within an organization.

"One of the biggest challenges for us was tailoring a presentation to the many different audiences at Crane, as a presentation could be seen by engineers who have high technical expertise or by a congressional staffer who has very little technical expertise," says Soderling, who now works at FORVIS as an auditor in their Indianapolis office. "Knowing the audience was important, and it was surprising to see the impact it had when we proposed our ideas."

Brian Richie's team worked with Firmatek, a service firm that helps mining, aggregates, solid waste, and similar firms with inventory tracking and periodic counts. They specifically analyzed the newly acquired division named Kespry, which allows all the inventory tracking to be completed using drones and software processing. Kespry was in the process of bankruptcy when Firmatek acquired it, and the team's job as consultants was to analyze its various costs and build a model to help Firmatek management shave costs and properly price their new and existing contracts with clients.

"We had a responsive and knowledgeable client contact, who

was able to give us a clear direction of where she wanted us to go with the project, including deliverables," says Richie. They started by parsing costs from Firmatek's financials as well as related costs from other source documentation. After all the relevant costs were identified with the help and approval of their client, the team started to build the dynamic model that would allow Firmatek to change inputs and drivers and see the impact on costs and cost allocations. Members of Firmatek management loved the model and are currently using it to analyze existing client contracts.

"Working on this project gave me confidence that I can apply what I've learned in class to real-world situations," says Richie. "Our team used cost accounting concepts such as ABC costing and regression analysis to deliver the best model possible."

Richie, who recently started working at Blue & Co. in the Indianapolis office doing healthcare audit and reimbursement consulting, notes that the class served as a good bridge between school and his future career.

"When I get to my first job, I'll know what to look for and how to add even more value to the teams I'm on," he says. "The course shaped me professionally by forcing us to think and interact independently with our client. It was completely up to us to find how to navigate from the start to the client's asks."

Richie was surprised about the quality of deliverable that he and his team were able to produce.

"That shows me that I'm able to do much more than I envisioned beforehand," he says. "Coming out of this program, I now feel prepared to do anything related to accounting, finance or consulting."

For more information about A505 or A569, email Chris Cook (cookchs@indiana.edu).

MBA Finds Real-Time Solutions to Real-World Problems through GLOBASE Program

by Christy Heitger-Ewing

The Global Business and Social Enterprise (GLOBASE) program has been instrumental in providing MBA students with a new perspective on their ability to help small businesses thrive in developing countries. GLOBASE 2023 was extra special as students once again got to meet with their clients in person after having to meet virtually during the pandemic.

“Meeting in person provided us with the ability to provide better consulting solutions. More importantly, we got to learn so much from each client we served.”

Brian Miller



"Meeting in person provided us with the ability to provide better consulting solutions. More importantly, we got to learn so much from each client we served," says Professor Brian Miller, who has led GLOBASE trips for six years. Although GLOBASE has been to Indonesia before, this was the first-ever trip to the island of Bali, where they served four clients.

They helped Pilar Bali, a furniture manufacturer that produces teakwood furniture for hotels and restaurants around the world.

"We were able help the small family-owned client with ways to improve their pricing and marketing aspects of their business," says Miller.

They also worked with former IU accounting alumn Cintha Mardanus, who is the owner/director of the Seminyak Beach Resort and Spa. The GLOBASE team helped Mardanus with her marketing and booking efforts following the pandemic. In addition, they helped market some new products for a start-up ecofriendly company called Soul Soil that focuses on quality organic fertilizers and organic seeds, while considering economic, social and environmental sustainability. Finally, they helped Dura Villas with pricing and human resource issues while also suggesting expansion ideas into wedding events.

Aditya Putra is currently a sponsored student from the Central Bank of Indonesia (BI).

"I strongly believe that the experience from GLOBASE will build my confidence, enhance my communication and leadership capabilities, and broaden my international network," says Putra. "GLOBASE was an exciting opportunity for us to take skills that we've gained from business school and apply them in a real business environment."

Graham Woodward loved working with a local company as part of a consulting team as he will be consulting for both his internship and post-graduation.

"The skills required by this project—marketing strategy, human capital improvement, and effective pricing—fit perfectly into my future path and what's required to succeed or bring value to a firm," says Woodward.

As a marketer and former manager, Sarah Barry learned that consumer awareness and brand recognition is

key to long-term success. The team drew on their client meetings, prior work experiences and Kelley focuses to inform their strategy and regrow the customer base. Their mentor and trip leaders challenged the team to broaden their approach and think strategically about business results. They structured their marketing strategies to attract consumers to purchase through direct booking channels, aiming to improve business margins and grow the company's bottom line.

"Solving a hypothetical case for Apple or dissecting a marketing case is an interesting and informative classroom exercise, but GLOBASE transitions students to the real world," says Barry. "Working with a real small business that's seeking help and using acquired business acumen to create solutions with value creates the sense of urgency and responsibility one will face throughout their professional career."

Collaborating with students that aren't from the same academy gave Pam Davila a different perspective on how to tackle problems.

"I was used to working with other marketing students, but my group had two consulting students so the way they approached a problem was different from the way I'd do it," says Davila. "Also, working with international clients adds an extra layer of complexity due to the differences in

culture. This has improved my communication skills since I had to be very purposeful in what I said and did when working with the client."

This memorable trip solidified for Woodward the notion that everyone has their own story.

"Driving through the streets of Ubud, I saw motorbikes carrying families of four, rice field workers tending the fields in the extreme heat, and men and women selling small trinkets for less than \$1," says Woodward. "You learn quickly how fortunate you are."

Barry maintains that whether a student aims to give back some of their MBA knowledge to a small business looking for support, sharpen their consulting capabilities, or step outside their comfort zone, GLOBASE can aid them in their goal.

"I'd repeat the experience 100 times over," she says.

Next year the GLOBASE program plans to work in Greece, Botswana, and Argentina!

"I'd repeat the
experience 100
times over."

Sarah Barry

Undergraduate Program: IU Kelley School's Undergraduate Program #8 Overall Ranking by U.S. News and World Report

The Kelley School of Business continues to be highly ranked! The undergraduate program's overall ranking by *U.S. News and World Report* remains #8. Seven disciplines in the Kelley School are ranked in the top 10. The Accounting program continues to be ranked #4 overall (#3 among public institutions).

During the 2022–23 academic year, the top hiring industries continue to be public accounting, consulting, investment banking and financial services (see graphic). The top full-time hiring companies were EY, PwC, KPMG, Deloitte, JPMorgan Chase and Grant Thornton. Average starting salaries increased over 4%.

Starting salaries for accounting majors averaged \$73,600. In addition, Kelley School of Business accounting majors received an average signing bonus of \$5,600. Hiring this year is expected to remain consistent with prior years.

NOTE: All data as of May 22, 2023 and preliminary to the UCSO Annual Report.

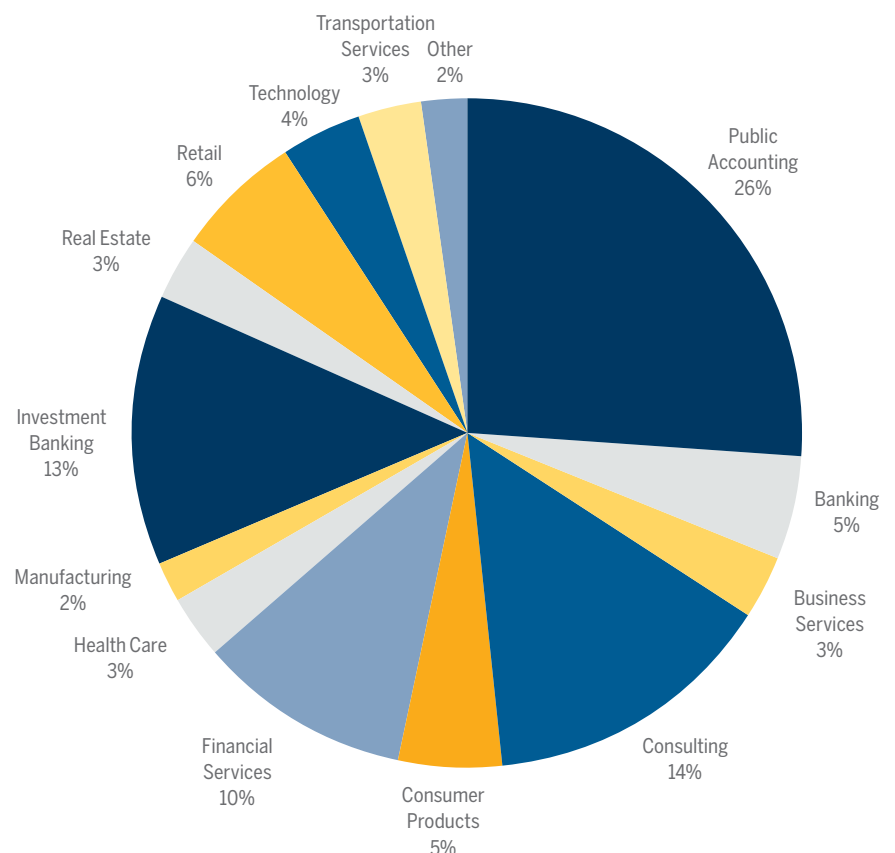


Kelley Undergraduate Program
U.S. News & World Report



Kelley Accounting Program
U.S. News & World Report

Full Time Employment by Industry



SAS Hosts Well-Attended Partners Picnic

by Christy Heitger-Ewing

During the 2021–22 school year, Dayton Melaniphy, president of the Student Accounting Society (SAS), was in charge of organizing the annual Partner Picnic—a big recruiting fair that kicks off the school year. When the event had to transition online due to the pandemic, Melaniphy began planning for the August, 2022, picnic, which ultimately hosted 30 companies from across the country and attracted more than 1,000 students.

“It used to be mostly CPA firms, but over the last few years we’ve seen that the demographics in Kelley have shifted towards financing, consulting and marketing so we brought in other companies as well,” says Melaniphy. “The result was a much better response from students.”

Including such a wide scope of companies helped attendees see that accounting is not just about sitting behind a desk doing paperwork.

“If you’re doing tax, you’re problem-solving. If you’re doing audit, you’re ensuring compliance. If you’re doing consulting within accounting, you’re helping your client achieve the best outcome,” says Melaniphy. “By showing those dynamic skillsets at the Partners Picnic, we’re able to show diversity within accounting.”

SAS is expecting between 40–45 firms to participate in this year’s picnic, many of which are from the corporate side because Kelley is hearing more students express an interest in going into the private sector compared to public accounting.

“Often in accounting, you go to one of the big four or large firms for several years before switching to industry,” says Melaniphy. “This gives students a better understanding of what they’ll be looking at later in their careers so they get a sense of the longevity of what they can do in accounting.”

The key is figuring out your passion because every company has accounting in some form, whether it’s healthcare or the NBA.

“You can tailor your career to fit your personal experiences and interests.”

Dayton Melaniphy





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About Us

When you understand accounting, you understand how business works. Kelley's accounting curriculum explores the relationship between business decisions and the bottom line. After completing our challenging courses, working on team projects, bolstering their communication skills, and completing an internship or field experience, our students are prepared for a variety of careers.

Explore our site at
kelley.iu.edu/accounting
or contact us at acctg@indiana.edu
with any questions.

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