

DAVID E. JONES

EDUCATION AND CERTIFICATION

Doctor of Management, Case Western Reserve University, May 2013
MTax (Master of Taxation), Georgia State University, September 1985
BSBA Accounting, Auburn University, June 1975.
PFS designation received in 1988 (currently inactive)
CPA certificates, current: Georgia, Ohio
CGMA

RESEARCH

“The Devil and the Deep Blue Sea: an empirical analysis of client advocacy and governmental FIDELITY by tax practitioners”. David E. Jones, Timothy J. Fogarty, and James Gaskin. Presented at the Tax Behavioral Symposium, George Mason University, 2013.

“Between a Rock and a Hard Place: How Tax Practitioners Straddle Client Advocacy and Professional Responsibility” Timothy J. Fogarty and David E. Jones, submitted for publication *Qualitative Research in Accounting and Management*, Vol 11, No 4. 2014 pp 286-316.

“Institutional Compliance vs. Client Loyalty in the Consideration of Ambiguous Issues: The Social Construction of Tax Advice”, David E. Jones, Timothy J. Fogarty, and Sheri Perelli. Accepted for presentation at the Academy of Management Conference, Cross Divisional Section, Boston, MA, August 3-7, 2012.

“Between a Rock and a Hard Place: How Tax Practitioners Straddle Client Advocacy and Professional Responsibility”, Timothy J. Fogarty and David E. Jones. Presented at the AAA Ohio Regional Meeting, Cincinnati, OH; May 2012.

“A FREE Tax Deduction gets a Boost”, David E. Jones, Real Estate Law Journal, projected publication date Winter 2017.

PROFESSIONAL EXPERIENCE

Temple University, Philadelphia, PA (January 2014 to Present)

Associate Professor: Responsible for teaching Advanced Accounting, Advanced Federal Taxes and Federal Taxes on Income

Jerome Fox Chair in Accounting, Taxation and Financial Strategy

Ascend Faculty Advisor

AACSB Accreditation Implementation Co-leader

Programs Committee Co=chair

BBA Core Quantitative Reasoning Subcommittee member

Awards: Most Involved Faculty Award Spring 2016 SPO Banquet

Faculty of the year Award 2015-2016 Academic Year Temple MAcc Program

Case Western Reserve University, Cleveland, OH (January 2013 to Present)

Associate Professor: Responsible for teaching 3 courses in Fall 2013, and 1 course in Spring 2014 including Advanced Accounting, Advanced Federal Taxation and Multi-jurisdictional Taxation.

Beta Alpha Psi Faculty Advisor
VITA Faculty Advisor
Accountancy Department Undergraduate Faculty Program Director
Accountancy Department Curriculum Committee Chair
Weatherhead UGIS Committee
Case Western Reserve University Blackboard Advisory Committee

Case Western Reserve University, Cleveland, OH (July 2012 to January 2013)
Visiting Associate Professor: Responsible for teaching 2 courses in Fall 2012, and 2 courses in Spring 2013 while completing the Doctor of Management degree.

Case Western Reserve University, Cleveland, OH (August 2010 to June 2012)
Adjunct Professor: Responsible for teaching masters level ACCT 405 Advanced Federal Taxes, and undergraduate level ACCT 304 Advanced Financial Reporting.

Slippery Rock University, Slippery Rock, PA (August 2009 – May 2010)
Instructor, Accounting: Responsible for teaching two courses per semester in the area of accounting, tax, auditing.

AACSB Bridge Program Graduate (June 2009)

Consultant, Thompson, Ohio (May 2007 – Present)

SS&G Financial Services, Inc., Solon, Ohio (January 2006 – May 2007)
Tax leader, Solon Office: Responsible for all tax consulting and compliance of a 35 person tax department serving entrepreneurs, individuals, estates and trusts. Dave was one of three members of a tax executive committee responsible for the tax practice of all locations of SS&G Financial Services, Inc.

Ernst & Young, LLP, Cleveland, Ohio (October 2000 – September 2006)
Global Mobility Markets Leader, US Tax Leader and Global Co-CEO: Responsible for all expatriate tax consulting and compliance functions in the US tax practice; sales and marketing leader for all global expatriate tax consulting and compliance engagements; co-CEO of the global expatriate tax practice responsible for all tax functions on a global basis. Global leader for over 1800 tax professionals worldwide and \$350M in revenues.

Major Accomplishments

- Developed and implemented a world-wide software system for managing expatriate tax clients
- Implemented a tax outsourcing office in Bangalore, India
- Had a win rate of 50% of major expatriate tax programs changing service providers
- Led the team that won the IBM expatriate tax engagement, one of the world's largest programs

Ernst & Young, LLP, Cleveland, Ohio (February 1996 – October 2000)
Tax Managing Partner Lake Erie Area: Responsible for all tax functions of a nine office, five state (Michigan, Ohio, W. New York, W. Pennsylvania, West Virginia) tax practice including over 600 tax professionals and over \$100M in revenues. Served on the Lake Erie Area Executive Committee.

Major Accomplishments

- Increased revenue approximately 10% on average every year and profitability 8% per year.

- Served Fortune 500 clients like: TRW, and Sherwin-Williams
- Implemented a variety of strategic firm initiatives like: compliance mega-processes, and consulting specialization
- National Tax Compliance Advisory Committee
- Lake Erie Area women's initiative and minority task force member.

Ernst & Young, LLP, Indianapolis, Indiana (November 1993 – February 1996)

Tax Managing Partner, Midwest Sub Area

Responsible for all tax functions of five offices, three state (Indiana, Ohio, Kentucky) tax practice including over 300 tax professionals and \$70M in revenues.

Ernst & Young, LLP, Orlando, Florida (March 1990 – November 1993)

Mid Florida Office Tax Leader for Orlando and Daytona Beach Locations

Ernst & Young, LLP, Atlanta, Georgia (September 1985 – March 1990)

Tax Senior Manager

Aldridge Borden & Co. PC, Montgomery, Alabama (January 1975 – September 1984)

Partner

West Point Pepperell, West Point, Georgia (September 1974 – January 1975)

Internal Auditor

PROFESSIONAL MEMBERSHIPS

American Accounting Association, member

American Institute of CPAs, member

Ohio Society of CPAs, member