

**Dr. JAMES J. CARROLL, CPA**

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**Resume/CV of Dr. James J. Carroll, CMA, CPA, CFE, CFM, CFF, CGMA**  
(Version as of 1 January 2025)

**Education & Professional Qualifications**

BS Industrial Engineering, New Jersey Institute of Technology, 1969  
MBA Finance, Rutgers University, 1972  
Doctorate in Business Administration, Nova Southeastern University, 1987  
Certified Management Accountant (CMA)  
Certified Public Accountant (CPA) New Jersey  
Certified Fraud Examiner (CFE)  
Certified Financial Manager (CFM)  
Certified in Financial Forensics (CFF)  
Chartered Global Management Accountant (CGMA)

**Work Experience**

Georgian Court University, Lakewood, New Jersey – 2020 Professor Emeritus/retired, 1991 to 2020 - Professor (promoted from Associate Professor in 1995), Department Chair (2003 to 2005), and MBA Director (2012 to 2015). Courses taught include Strategic Management (Graduate and Undergraduate), Advanced Auditing (graduate), Advanced Accounting Theory, Advanced Accounting Problems, Auditing, Attestation and Corporate Governance (graduate and undergraduate), Financial Management (graduate and undergraduate), Investment Analysis & Portfolio Management (graduate and undergraduate), Fraud Auditing and Forensic Accounting (graduate), Health Care Finance (graduate), Personal Financial Planning (undergraduate) Accounting Information Systems, Managerial Accounting and Budgetary Control (graduate and undergraduate), Business Strategies & Policy, Business & Professional Ethics, Corporate Governance and Business Ethics (graduate), Strategic Cost Management (Executive MBA), Federal Taxation, Intermediate Accounting, Governmental and Not-for-Profit Accounting, and Principles of Accounting. Selected by the students to be an honored faculty member of the Delta Mu Delta Honor Society in Business.

Fairleigh Dickinson University, Rutherford, NJ - Assistant Professor - 1988 to 1991 - Courses taught include graduate and undergraduate Management Accounting, Management Information Systems, Production Management, Fundamentals of Computer Usage, Business Finance, Labor Relations, Employee Development, and Business Policy.

William Paterson College, Wayne, New Jersey – Assistant Professor - 1983 to 1988 - Courses taught: Production Operations Management, Small Business Management / Entrepreneurship, Corporate Strategy and Policy, Cost Accounting I and II, Corporate Finance, Principles of Management, Organization Behavior, and Personnel / Human Resource Management. Awards included: Winner \$7,500 Leavey Award for 1987 for Excellence in Private Enterprise Education from the Freedoms Foundation, Winner - 1986 Freedoms Foundation at Valley Forge Honor Certificate for Excellence in Economic Education, Grant Recipient \$60,000 NJ DHE grant on computer applications in the business curricula, founder WPC New Venture Award program, Co-chairman Faculty Development seminar 1987-8, program director Writing Across the Curriculum committee 1987-8, Chairman of Faculty Senate Planning committee 1987, appeared in several television commercials about the college.

Principal and Consultant

Dr. James J Carroll, CPA - selected assignments, 1982 and continuing  
Principal and Director of Instruction  
Accounting Educators – a continuing education provider for CPAs- 2006 and continuing  
Manager - Financial Planning and Analysis/Group Controller  
Honeywell Corporation (then called Allied - Signal Inc.) - 1980-1982  
Controller and Treasurer  
Sandvik Conveyor, Inc. - 1979-1980  
Manager - Financial Analysis & Cost Accounting  
Worthington Pump Corporation - 1976-1979  
Assistant Group Controller  
Engelhard Corporation - 1973-1976  
Management Consultant  
Deloitte (then called Touché Ross) - 1972-1973

**Samples of Proprietary Research Studies and Related Activities**

Expert Witness in legal matters to determine the economic consequences of commercial, industrial, and personal incidents, accidents, and proposed activities. Activities include researching matters, gathering financial, demographic, and socio-economic data, preparing, issuing, and defending reports/opinions for plaintiff and defense positions, advising during discovery, deposition appearances, and testifying in State and Federal courtrooms. Clients include large and small law firms, businesses, individuals, and insurance and financial service companies. Areas of study include product liability, stock and option valuation, wrongful termination of employment, divorce/child support, industrial and commercial accidents, wrongful death, and hedonic damages. Reports issued include:

- Leone v. Yannuzzi, et al., for Enright, Lenney & McGrath, West Orange, New Jersey, June 1988.
- Shirley v. GAF Corp., for Orbe, Nugent, Collins & Darcy, Ridgewood, New Jersey, June 1988.
- Shirley v. GAF Corp. (extended), for Orbe, Nugent, Collins & Darcy, Ridgewood, New Jersey, October 1988.
- Shirley v. GAF Corp. (updated), for Orbe, Nugent, Collins & Darcy, Ridgewood, New Jersey, October 1988.
- Wiggins v. Sanford Rose, for Weiss, Healey & Rea, Mt. Laurel, New Jersey, November 1988.
- Starr v. Kamatoy, for Orlovsky, Moody & Gabrysiak, Eatontown, New Jersey, December 1988.
- Kriegsteen v. Muldoon, et al., for Richard A. Amdur, Oakhurst, New Jersey, June 1989.
- Palko v. Binks, et al., for George Matteo Jr., Laurel Springs, New Jersey, January 1989.
- Michelson v. Prime Management Company, for A. J. Fusco, Passaic, New Jersey, January 1990.
- Kelly v. Northern Engineering, for Stief, Waite, Gross, Sagoskin & Gilman, Newtown, Pennsylvania, January 1991.
- Great American Meat & Seafood v. H&H Purveyors, et al., for Edward G. O'Byrne, Totowa, New Jersey, March 1991.
- American Business Academy v. Melone, for Chase & Chase, Hackensack, New Jersey, June 1991.
- Nutter v. Louie's Inn et al., Greenberg & Margolis, Atlantic City, New Jersey, August 1991.
- David Bassinder et al. v. Ric-Cic, Gerald F. Herrmann, Toms River, New Jersey, January 1992.
- Thermal Chek v. Wegoma, Matteo & Cuneo, Moorestown, New Jersey, March 1992.
- Samuel Tilles, Inc. v. Henry's Playland, Inc., Gerald F. Herrmann, Toms River, New Jersey, April 1992.
- Bassinder et al. v. Jenkinsons et al., Novins York Pentony, Toms River & Gerald F. Herrmann, Toms River, June 1992.
- Novacovici v. Brereton, Martin K. Indik, Princeton, New Jersey, June 1992.
- Van Ysseldyk v. Zabarsky Citta et al., John C. Burley, Leonia, New Jersey, July 1992.
- Theodore Burnett v. Garlock Equipment Corporation, Richard H. Theile, Somerville, New Jersey, July 1992.
- Gern, Dunetz, Davison & Weinstein, Esqs. v. Greenspoon, John Burley, Leonia, New Jersey, August 1992.
- Simon v. Atlantic Employees, K. Ruth Larson, Edison, New Jersey, September 1992.
- Commodity & Spice, Inc., v. K & K of Central Jersey, Inc. et al., Santoro & Santoro, September 1992.

Heiser v. Doe et al, Gebhardt & Keifer, Clinton, New Jersey, October 1992.  
Elaine Smith, et al. v. Spruce Spiral Associates et al., Addas & Potenza, Jersey City, October 1992.  
Prowker v. Bass Transportation Company, Inc., John Weinhofer, Flemington, New Jersey, November 1992.  
Evo C. Antonini v. Seymour Chase et. al., Milton Diamond, November 1992.  
Krachun v. City of Manville, John Gross, Somerville, New Jersey, January 1993.  
Ferrari v. UIM/CIGNA Insurance Companies, Marc M. Kaye, Livingston, New Jersey, January 1993.  
Denise Zube v. Harold Ritvo et al., John Burley, Leonia, New Jersey, January 1993.  
Vincent Chudy v. W.T. Billard, et als, Richard H. Theile, Somerville, New Jersey, February 1993.  
Richard DiLullo, et al. vs. Ronald W. Bronstein, et als, Richard H. Theile, Somerville, New Jersey, June 1993.  
Gern, Dunetz, Davison & Weinstein, Esqs. v. Greenspoon, John Burley, Leonia, New Jersey, June 1993.  
Thorpe v. International House of Pancakes, et al., Donington Karcher Leroe Salmond Luongo & Ronan, Edison, New Jersey, July 1993.  
Massaro v. UIM, O'Malley & Surman, Bricktown, New Jersey, August 1993.  
Philomena M. Mazyk v. AT&T, Richard H. Theile, Somerville, New Jersey, September 1993.  
Doreen Martin v. Prudential, Raymond E. Murphy Jr. Esq., Englewood, New Jersey, October 1993.  
Jack Serratelli v. JPD, Inc., Thomas S. McNamara, Princeton, New Jersey, October 1993.  
Himmelwright v. Stern Steiger et al., Hilton Stein, Montville, New Jersey, January 1994.  
Sugleris v. Ricci, Karim Arzadi, Perth Amboy, New Jersey, February 1994.  
Extended Technologies vs. Elexor, Lewis Freimark, Hoboken, New Jersey, February 1994.  
Walker v. GAB Business Services, Roberts & Finger, Parsippany, New Jersey, March 1994.  
Winkler v. GAB Business Services, Roberts & Finger, Parsippany, New Jersey, March 1994.  
Denise Zube v. Robert Zube, Pro Se, April 1994.  
Neubert v. Bayshore Painting, Amdur Boyle Maggs & McDermott, Oakhurst, New Jersey, June 1994.  
Emmis Broadcasting vs. Medical Control Center, John C. Burley, Leonia, New Jersey, June 1994.  
Baker v. Lilly W. Gonzalez, M.D., McGlynn Reed Hense & Pecora, Point Pleasant, June 1994.  
Allen v. Allen, Howes & Howes, Raritan, New Jersey, July 1994.  
Kenneth Osberg v. Exxon Corporation et al., John C. Burley, Leonia, New Jersey, July 1994.  
Goldsman et al. v. Prudential Bache et al., Floyd C. Goldsman, East Orange, New Jersey, August 1994.  
Rojas v. Stednitz, Victor M. Covelli, Belmar, New Jersey, September 1994.  
Charles D. Lott v. Susan J. Burns and E. M. Haynes, Inc., Psak & Parker, Middlesex, New Jersey, September 1994.  
Orozco v. Toshiba, (economic issues) Ronald Wm. Spevack, Woodbridge, New Jersey, October 1994.  
Orozco v. Toshiba, (management issues) Ronald Wm. Spevack, Woodbridge, New Jersey, October 1994.  
Effenberger v. Rubino et al, Frank P. Marano, West Orange, New Jersey, November 1994.  
Crespo v. Butler, Antonio L. Cruz, Perth Amboy, New Jersey, December 1994.  
Lira v. City of Passaic et al., Edward G. O'Byrne, Totowa, New Jersey, January 1995.  
Charles D. Lott v. Susan J. Burns and E. M. Haynes, Inc., (extended) Psak & Parker, Middlesex, New Jersey, February 1995.  
Napoleon et al. v. Johnson et al., Edward G. O'Byrne, Totowa, New Jersey, March 1995.  
Calleo v. Phillips Lighting, Ronald Wm. Spevack, Woodbridge, New Jersey, March 1995.  
Gunther v. Zambon, Michael F. Chiarella, Red Bank, New Jersey, April 1995.  
DeRose v. Jones, Psak & Parker, Middlesex, New Jersey, April 1995.  
Bedrosian v. Smith, Samuel L. Peluso, Long Branch, New Jersey, May 1995.  
Karabinchak v. Rodriguez, Samuel L. Peluso, Long Branch, New Jersey, June 1995.  
DeCarlo v. Irvington Board of Education, Christopher M. Hartwyk, South Orange, New Jersey, June 1995.  
Burggraf v. Jardine, Edward G. O'Byrne, Totowa, New Jersey, July 1995.  
Horn v. JFK Medical et al., Ronald Wm. Spevack, Woodbridge, New Jersey, July 1995.  
Taylor v. New Jersey Economic Development, Gerald P. Scala, Point Pleasant, New Jersey, July 1995.  
Lowe v. Wills Equipment, Roeber & Stonehill, Forked River, New Jersey, July 1995.  
Weston v. Precision Vision, Edward G. O'Byrne, Totowa, New Jersey, August 1995.  
Frost v. Brenner et al., Frederick L. Woeckener, Hyde Park, Vermont, and Hoboken, New Jersey, August 1995.

Ramos v. Hartmann, Karim Arzadi, Perth Amboy, New Jersey, August 1995.  
Gregor v. Shahadi, Frederick L. Woeckener, Hyde Park, Vermont, and Hoboken, New Jersey, October 1995.  
Caggiano v. Prudential, Edward G. O'Byrne, Totowa, New Jersey, October 1995.  
Campbell v. Schroeder & New Jersey Bell, Philip E. Miller, Old Bridge, New Jersey, December 1995.  
Bent et al. v. Feinberg, Pro Se Plaintiff, Manahawkin, New Jersey, February 1996.  
Canavos v. Delran Board of Education, Lenox Socey Wilgus Formidoni & Casey, Trenton, New Jersey, March 1996.  
Lafferty v. Hunt et al., Smith & Shaw, West Long Branch, New Jersey, April 1996.  
Bedrosian v. Smith (updated), Samuel L. Peluso, Long Branch, New Jersey, May 1996.  
Leeper v. Dover Industries, Sears et al., William J. Courtney, Flemington, New Jersey, June 1996.  
Larson v. Township of East Windsor et al., Edward G. O'Byrne, Totowa, New Jersey, July 1996.  
Kutumbos v. Stonaker, William A. Despo, Newark, New Jersey, August 1996.  
Becker v. Getzoff Kuchler et al., Edward G. O'Byrne, Totowa, New Jersey, August 1996.  
Linwood Wholesale v. Morgan et al., Robert A. Gleaner, Audobon, New Jersey, September 1996.  
DeMane v. Diversified Vacuum, Psak & Parker, Middlesex, New Jersey, December 1996.  
Keith McQuaid as Sports Coliseum Inc. v. Alliance Automatic Sprinkler, Kivler & Bocchini, Hamilton Square, New Jersey, December 1996.  
Miller v. Morris, Rospond et al., John C. Burley, Leonia, New Jersey, February 1997.  
Eden v. Vonthun, et. al., Richard Zeitler, Iselin, New Jersey, February 1997.  
Lee v. Wang et al., Raymond E. Murphy, Jr. Esq., Englewood, New Jersey, February 1997.  
Sussex & Warren v. Andover, Raymond E. Murphy Jr. Esq., Englewood, New Jersey, April 1997.  
Greenfield v. Lippman, John Ambrosio, Lyndhurst, New Jersey, April 1997.  
Surmacz v. National Consumer Insurance, Netchert Dineen & Hillmann, Jersey City, New Jersey, May 1997.  
Heidel v. Barsalona, Paul E. Zager, Tinton Falls, New Jersey, June 1997.  
Lewis Street v. Salon Interiors, Edward G. O'Byrne, Totowa, New Jersey, June 1997.  
United Jersey Bank v. Superior Enerquip et al., John C. Burley, Leonia, New Jersey, July 1997.  
Silva v. Jagid, Antonio L. Cruz, Perth Amboy, New Jersey, August 1997.  
Stafford Pool & Fitness Center, Inc. v. Bent, Edward G. O'Byrne, Totowa, New Jersey, September 1997.  
Santos v. Bowman, Nicholas J. Palma, Esq., Clifton, New Jersey, September 1997.  
Estate of Michael A. Drake, Reinheimer & Krug, Toms River, New Jersey, October 1997.  
Benitez v. Spearman et al., Antonio Martinez, Trenton, New Jersey, December 1997.  
Lewis Street v. Salon Interiors (supplement), Edward G. O'Byrne, Totowa, New Jersey, January 1998.  
Tobias v. Calhoun & Associates et al., John C. Burley, Leonia, New Jersey, February 1998.  
Zydiak v. Caldwell College (earnings), David B. Rubin, Metuchen, New Jersey, February 1998.  
Zydiak v. Caldwell College (life enjoyment), David B. Rubin, Metuchen, New Jersey, March 1998.  
Marino v. Schmieder, Mulvaney Coronato & Brady, Toms River, New Jersey, April 1998.  
Domenici v. Orange & Rockland Utilities, Abraham Lowenstein Bushman & Kauffman, Philadelphia, Pennsylvania, May 1998.  
Budd Lerner v. Consolidated Supermarkets, John C. Burley, Leonia, New Jersey, June and December 1998.  
Suizzo v. High Lawn, Inc., Edward G. O'Byrne, Totowa, New Jersey, July 1998.  
Stafford Pool & Fitness Center, Inc. v. Bent (fiduciary management), Edward G. O'Byrne, Totowa, New Jersey, July 1998.  
Gonzalez v. County of Passaic, Nicholas J. Palma, Esq., Clifton, New Jersey, July 1998.  
Dickson v. Parsippany Theatre, Resnikoff & Resnikoff, Long Branch, New Jersey, July 1998.  
Kothari v. Parikh, et al., Raymond E. Murphy Jr. Esq., Englewood, New Jersey, September 1998.  
Williams v. Klammer, O'Connell & Riley, Pearl River, New York, October 1998.  
Carmona v. Zhao, Victor M. Covelli, Belmar, New Jersey, October 1998.  
Tynan v. Curzi et al., (partial report #1) John C. Burley, Leonia, New Jersey, November 1998.  
HB Realty Association LP v. Bloom & Bloom et als, (accounting) Edward G. O'Byrne, Totowa, New Jersey, November 1998.  
HB Realty Association LP v. Bloom & Bloom et als, (economics) Edward G. O'Byrne, Totowa, New Jersey, November 1998.  
Tynan v. Curzi et al., (partial report #2) John C. Burley, Leonia, New Jersey, January 1999.

Lira v. City of Passaic et al., Edward G. O'Byrne, Totowa, New Jersey, January 1999.  
Dinallo & Cooperstown Dream Park, Edward G. O'Byrne, Totowa, New Jersey, January 1999.  
Henry's Playland, Inc. v. Samuel Tilles, Inc., Novins, York & Pentony, Toms River, New Jersey, March 1999.  
Lewis Green v. Jersey Central and v. Lebkicher, Raymond T. Majewski, South Plainfield, New Jersey, March 1999.  
NCIC v. Major et al., Netchert Dineen & Hillmann, Jersey City, New Jersey, April 1999.  
Oels v. Di Palma et al., Raymond T. Majewski, South Plainfield, New Jersey, April 1999.  
Watkins v. Kellogg et al., George J. Cotz, Ramsey, New Jersey, April 1999.  
Hocking v. Geddis, John C. Burley, Leonia, New Jersey, May 1999.  
Mermini v. Eatontown Stuart, Pathmark et al., Resnikoff & Resnikoff, Long Branch, New Jersey, June 1999.  
Stucki v. Allstate and Stucki v. Oliveira et al., Edward G. O'Byrne, Totowa, New Jersey, June 1999.  
Damayo v. Tolentino, Raymond E. Murphy, Jr. Esq., Englewood, New Jersey, July 1999.  
Sperling v. Bristol-Myers Squibb, Inc., Smith & Shaw, West Long Branch, New Jersey, August 1999.  
Renaud v Certified Scuba Diver Training Facility, Psak Graziano, Piasecki & Whitelaw, Middlesex, New Jersey, August 1999.  
Biddle v. Acme, Riley & Shovlin, Clementon, New Jersey, October 1999.  
Fletcher v. Winget, Milton Diamond, Freehold, New Jersey, January 2000.  
Chen v. Stern, Berkowitz et al., John C. Burley, Leonia, New Jersey, January 2000.  
Deventer v. Fairmount Cemetery, Edward P. Papalia, Chatham, New Jersey, February 2000.  
Fichner v.  
    Ragan et al., Gerald F. Kelly, Denville, New Jersey, April 2000  
    A-1 Plumbing & Heating, Gary Mason, Marlboro, New Jersey, April 2000  
    Lugo, Shebell & Shebell, Oakhurst, New Jersey, April 2000  
    Rent-a-Car et al., Shebell & Shebell, Oakhurst, New Jersey, April 2000  
Pease v. First Union, al, Edward G. O'Byrne, Totowa, New Jersey, April 2000.  
Krautheim v. County of Passaic, Francis X. Dorrity, Jersey City, New Jersey, July 2000.  
Baker v. Carvel Corporation (Giampapa), Duane Morris & Heckscher, Philadelphia, Pennsylvania, July 2000.  
Brightman v. County of Passaic, Douglas J. Kinz, West Paterson, New Jersey, August 2000.  
Sanchez v. Cipolla, Victor M. Covelli, Belmar, New Jersey, September 2000.  
Ruiz v. Bridgeview et al., Marc J. Rogoff, Fords, New Jersey, September 2000.  
Tynan v. Vicinage 13 et al., Edward G. O'Byrne, Totowa, New Jersey, October 2000.  
Anthony Pilone v. Irvington Board of Education, Slowinski, Atkins & Czyz, Newark, New Jersey, October 2000.  
Liboria Grant Pilone v. Irvington Board of Education, Slowinski, Atkins & Czyz, Newark, New Jersey, October 2000.  
Joseph Isaacson v. Irvington Board of Education, Slowinski, Atkins & Czyz, Newark, New Jersey, October 2000.  
Dominick Tarquinio v. Irvington Board of Education, Slowinski, Atkins & Czyz, Newark, New Jersey, October 2000.  
Vincent Smith v. Irvington Board of Education, Hock, Graziano & Koprowski, Verona, New Jersey, December 2000.  
Michael Bent v. Stafford Township et al., Edward G. O'Byrne, Totowa, New Jersey, January 2001.  
Genardi v. Voila, Douglas J. Kinz, West Paterson, New Jersey, January 2001.  
Blume et al. Metallo, Edward G. O'Byrne, Totowa, New Jersey, January 2001.  
Facciponti v. Whiting Village el at, Edward G. O'Byrne, Totowa, New Jersey, February 2001.  
LR2A-JV v. Michael Bent et al. v. Health Associates Management, et al., Edward G. O'Byrne, Totowa, New Jersey, February 2001.  
Crisafulli v. Lackland, Philip E. Miller, Old Bridge, New Jersey, March 2001.  
Konovodoff v. Spence, Victor M. Covelli, Belmar, New Jersey, March 2001.  
Fiorellino v Steak & Ale, Millet & Hermes, Somerville, New Jersey, May 2001.  
Callahan v. Bugler, Peluso, Staufenberg, Castelluci & Hanula, Shrewsbury, New Jersey, June 2001.  
Guzman v. Blue Line, Edward P. Papalia, Chatham, New Jersey, June 2001.  
McLaughlin v. Wiggins, Edward P. Papalia, Chatham, New Jersey, July 2001.

Schmidt v. Hamilton Volkswagen-Mazda, Russell T. Kivler, Trenton, New Jersey, August 2001.  
LaBoy v. Tropicana, Edward P. Papalia, Chatham, New Jersey, September 2001.  
Larson v. Township of East Windsor et al., (update from 1996), Edward G. O'Byrne, Totowa, New Jersey, November 2001.  
Vargas v. City of Newark, Barry McTiernan & Moore, Jersey City, November 2001.  
Brain v. Estate of Rust, Smith & Shaw, West Long Branch, New Jersey, January 2002.  
LR2A v. Bent et al. v. Health Associate Management et al., Edward G. O'Byrne, Totowa, New Jersey, January 2002.  
Jackson v. Allstate, Zeller & Bryant, Cherry Hill, New Jersey, April 2002.  
Strippoli v. Deyitis Trucking et al., Slowinski, Atkins & Czyz, Newark, New Jersey, April 2002.  
Franco v. Homeowners et al., Edward G. O'Byrne, Totowa, New Jersey, May 2002.  
Burke v. Atlantic City, Zeller & Bryant, Cherry Hill, New Jersey, August 2002.  
Masiello v. Mangone, Edward P. Papalia, Chatham, New Jersey, September 2002.  
Noonan v. Harwood Lloyd, John C. Burley, Hackensack, New Jersey, February 2003.  
Scheidt v. Newark Star-Ledger, Edward G. O'Byrne, Totowa, New Jersey, February 2003.  
Staples v. Hunterdon Shopping Center, Reed and Scholl, Flemington, New Jersey, May 2003.  
Smith v. Somerville Overhead Doors, Schenck, Price, Smith & King, Morristown, New Jersey, July 2003.  
Koelsch v. Prudential, Edward G. O'Byrne, Totowa, New Jersey, July 2003.  
Shanker v. Hillside, Slowinski, Atkins & Czyz, Newark, New Jersey, October 2003.  
Hill v. Hobart, Barry McTiernan & Moore, Jersey City, October 2003.  
Kerian v. Mabie, Peluso Catelluci & Hanula, Shrewsbury, New Jersey, October 2003.  
Safier v. Walder, Sondak, & Brogan, Edward G. O'Byrne, Totowa, New Jersey, December 2003.  
Boada v. Perez, Barry McTiernan & Moore, Jersey City, December 2003.  
Pereira v. Port Authority et al., Levinson Axelrod, Edison, New Jersey, December 2003.  
Vogel v. Star-Ledger, Edward G. O'Byrne, Totowa, New Jersey, January 2004.  
Fortino v. County of Passaic, Douglas Kinz, West Paterson, New Jersey, January 2004.  
Bellavia, Nicholas J. Palma Clifton, New Jersey, February 2004.  
Palamar v. River Road Apts and Paradigm, Edward G. O'Byrne, Totowa, New Jersey, March 2004.  
Hrebenak v. Blessing Lowe Associates et al., Gerald R. Della Torre, Madison, New Jersey, April 2004.  
Alarco v. UIM, Herfoth McDonald & Gallicchio, Florham Park, New Jersey, August 2004.  
Silver Leaf v. Silver Leaf, Lowenstein Sandler, Roseland, New Jersey November 2004.  
Ocean Ventures at Bay Point Dune v. Albanese, Sinn Fitzsimmons Cantoli West & Pardes, Point Pleasant, New Jersey, January 2005.  
Juan Perez v. Cristino, Levinson Axelrod, Edison, New Jersey, April 2005.  
Estate of Brandon Symborski v Chatham Square et al., Levinson Axelrod, Edison, New Jersey, May 2005.  
Bryant v. Weiner, Maggs & McDermott, Brielle, New Jersey, June 2005.  
DiBello v City of Clifton, Edward G. O'Byrne, Totowa, New Jersey, June 2005.  
Long Island University Teachers Union – AFL-CIO – two non-litigation opinions, June 2005.  
Gunther v. Howell Board of Education et al., Edward G. O'Byrne, Totowa, New Jersey, June 2005.  
Pra Sisto v. Passaic, Love & Randall, East Orange, New Jersey, July 2005  
Arnold v United Jewish Foundation (UJF) and Young, W. Luger & Associates, August 2005.  
Sheridan v. Parisi Sport, Edward G. O'Byrne, Totowa, New Jersey, September 2005.  
Arena v. New Jersey Transit, Maggs & McDermott, Brielle, New Jersey, October 2005.  
Eileen Elias Freeman, Barry McTiernan & Moore, Jersey City, November 2005.  
Horowitz v. Stop & Shop et al., Levinson Axelrod, Edison, New Jersey, November 2005.  
McDonald v. Archdiocese, Francine R. Foner, Waldwick, New Jersey, February 2006.  
Gaetano Paxia, William P. Ronner, Avon, New Jersey March 2006.  
Davilla v. Flamboyan, Barry McTiernan & Moore, Jersey City, March 2006.  
Elwell v. City of Cape May, Edward G. O'Byrne, Totowa, New Jersey, May 2006.  
Bieber v. City of Cape May, Edward G. O'Byrne, Totowa, New Jersey, May 2006.  
Schmidt v. Hamilton Volkswagen-Mazda, Stark & Stark, Princeton, New Jersey, June 2006.  
Murphy v. Fitzroy, Psak & Associates, Middlesex, New Jersey, October 2006.  
Rockwell v. Vezza, Barry McTiernan & Wedinger, Jersey City, New Jersey, October 2006.  
LaPoint v. Edison, Levinson Axelrod, Edison, New Jersey, June 2007.  
Colatarci v. Pineval, Montgomery Chapin & Fetten, Bridgewater, New Jersey, July 2007.

McCormick v. Rumson et al., Montgomery Chapin & Fetten, Bridgewater, New Jersey, July 2007.  
Conover v. Davison, Davidson et al., Levinson Axelrod, Edison, New Jersey, August 2007.  
Byrne v. Monmouth County et al., John P. Brennan, Jr., Spring Lake Heights, New Jersey, October 2007.  
Pizzi v. Burlew, Blue Rock et al., Maggs & McDermott, Brielle, New Jersey, January 2008.  
Sadowski (Administratrix) v. Garcia, Nee Beacham & Gantner, Hillsborough, New Jersey, January 2008.  
Pizzi v. Burlew et al., Maggs & McDermott, Brielle, New Jersey, January 2008.  
Estate of Healy v. City of New York (Staten Island Ferry), Bosco, Bisignano & Mascolo, Staten Island, New York, February 2008.  
Petco v. Kiely, Barry McTiernan & Wedinger, Edison, New Jersey February 2008.  
Trapani v. Turner et al., Barry McTiernan & Wedinger, Edison, New Jersey, February 2008.  
Estate of Robert Franke v. Kardan, Douglas Kinz, West Paterson, New Jersey, March 2008.  
Rodriguez v. CIGNA et al, Marciano & Topazio, June 2008.  
Estate of Wisdom v. Naji et al., Colligan & Colligan, Newark, New Jersey, July 2008.  
Sobczak v. Borow, Psak & Associates, Middlesex, New Jersey, July 2008.  
Matech v. O'Connor, et al., Maggs & McDermott, Brielle, New Jersey, March 2008.  
Lanigan v. McKenna et al., William E. Meyer, Red Bank, New Jersey, October 2008.  
Maniscalco v. City of New York, Barry McTiernan & Wedinger, Edison, New Jersey December 2008.  
Sanders v. Re-Mark-Able Tree Service, Barry McTiernan & Wedinger, February 2009.  
Estate of Booth v. Clara Maass et al., Levinson Axelrod, Edison, New Jersey, March 2009  
Catanese v. Killian, Nee Beacham & Gantner, Hillsborough, New Jersey, March 2009.  
Pacunas v. Gardner et al., Montgomery, Chapin & Fetten, Bridgewater, New Jersey, May 2009.  
Kuczera v. Roehrig Maritime, Bosco, Bisignano & Mascolo, Staten Island, New York, July 2009.  
Estate of Love v. Johnson, Levinson Axelrod, Edison, New Jersey, July 2009.  
Hillman – affidavit of merit, Evans, Osborne & Kreizman, Ocean NJ, July 2009.  
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Smart v. Seton Hall et al, Barry McTiernan & Wedinger, Edison, NJ, May 2019.  
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### **Expert Witness Court Appearances**

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H. B. Realty v. Bloom & Bloom, et al., Superior Court of Passaic County, New Jersey, October 2000.  
Facciponti v. Whiting Village et al., Superior Court of Ocean County, New Jersey, July 2001.  
Fichner v Dollar Rent-a-Car et al., Superior Court of Monmouth County, New Jersey, July 2001.  
Blume v. Metallo, Superior Court of Essex County, New Jersey, October 2002.  
Strippoli v. Deyitis Trucking et al., Superior Court of Essex County, New Jersey, October 2002.  
Tynan v. Vicinage 13 et al., Superior Court of Morris County, New Jersey, March 2003.  
Noonan v. Harwood Lloyd, Superior Court of Essex County, New Jersey, July 2003.  
Lewis Green v. Jersey Central and v. Lebkicher, Superior Court of Middlesex County, September 2003.  
Krauthaim v. County of Passaic, Superior Court of Hudson County, October 2003.  
Rokos V. Gourvitz, Superior Court of Essex County, New Jersey, August 2004.  
Rokos V. Gourvitz, Superior Court of Essex County, New Jersey, September 2004.  
Vogel v. Star-Ledger, Superior Court of Middlesex County, October 2005.  
Lewis Green v. Jersey Central and v. Lebkicher, Superior Court of Middlesex County, September 2007.  
Estate of Banas v. Vital Mobile Care et al., Superior Court of Middlesex County, July 2011.  
Lyons v. Nordstrom (election), Superior Court of Morris County, September 2011.  
Frankfort v Ferrara, Superior Court of Essex County, December 2011.  
Hernandez v Glavin, Superior Court of Passaic County, January 2012.  
Cromer v. Hank Starr, Superior Court of Ulster County, NY, July 2012  
Larson v Larson, Superior Court of Union County, December 2012.  
Bahn v. Trinitas, Superior Court of Middlesex County, April 2014.  
Anderson v. Robert Wood Johnson, Superior Court of Middlesex County, June 2015.  
Nada/Srahin v. ADM Management, Superior Court of Essex County, June 2015.  
Abrams v. Michael Simon, Superior Court of Mercer County, January 2016.  
Moore (Life Care Plan Value), Superior Court of Middlesex County, June 2016.  
United States Environmental Protection Agency (EPA) v. Taotao USA, Inc. et al., Administrative Law Court, Washington, DC, October 2017.  
Stanton v. Lee, Superior Court of Essex County, September 2023.

**Extended consulting engagements through Eastern Research Group (ERG) of Boston, Massachusetts – recurring engagements within multi-year contracts**

2016 - 2021, United States Environmental Protection Agency (EPA), 2-3 cases per year  
2022 - 2023, United States Environmental Protection Agency (EPA), 3-4 cases per year  
2022 - 2024, California Air Resources Board (CARB), 4-6 cases per year  
2024 - 2029, United States Environmental Protection Agency (EPA)

**Other Experience – prior to 1983**

Business Analysis in start-up, turn-around, and acquisition situations, reporting to the Executive Vice President and Vice President of Finance. Participated in and assessed market projections, product and manufacturing process variations, facility expansion, and alternatives. Projected effects on profit and ROI for each alternative.

Developed and assisted in implementing start-up and maturation strategies for a new venture during its growth to \$100 million in sales and ROA exceeding 35%.

Assessed the desirability of three acquisition candidates from financial, operation, and human resource perspectives; presented and received the Board of Directors' approval for all three acquisition candidates; participated in two successful acquisitions and closings.

Conceived, developed, and participated in the implementation of an overall business strategy for the turn-around of a \$150 million business, including product line and customer pricing strategies, manufacturing facility redeployment, and sales manning assignments resulting in a projected P&L change of \$8 million per year.

Controller of a multi-location manufacturing enterprise with direct responsibility for cost and general accounting, EDP supervision, cash management, budgeting, and planning during its growth

through acquisition from \$10 to \$40 million in sales. Responsibilities included the direction of three divisional controllers and their staffs.  
Upgraded Manufacturing Accounting to provide focal information on manufacturing/volume variances and product line profitability while establishing clear lines of responsibility for costs and expenses.  
Installed divisional financial and operational reporting in existing and newly acquired companies.  
Cost Accounting Management in Job Order and Process environments.  
Identified needs and designed and implemented cost systems during the start-up of three manufacturing locations, including associated operational control systems.  
Cost systems design included business planning techniques such as direct costing and forecasting capabilities.  
Designed and installed a standard cost system in a Job Shop environment involving over 50,000 parts and sub-assemblies. The system was generated on IBM 370 equipment.  
Management consulting in operational and accounting areas for a "Big 4" international CPA firm.

### **Affiliations**

*The Journal of Small Business Management* - Editorial Board Member - 1990 to 2010. Selected as the Outstanding Member of the editorial board - 1996.  
*The Case Research Journal*- Editorial Board Member - 1994 and continuing. Selected as the Outstanding Member of the editorial board – 2000 and 2008.  
*The Journal of Managerial Issues* - Editorial Board Member - 1988 to 1995  
*The Journal of Small Business Strategy* - Editorial Board Member - 1994 and 1998.  
*Fraud Magazine: Journal of the Association of Certified Fraud Examiners*, Editorial Board member, 1999 to 2003.  
International Council of Small Business - Sr. Vice President for Finance - 1990 to 1992; Sr. Vice President for Research & Publications - 1992-1993  
Academy of Management member 1988 and continuing - Director for the Management Education Division 1997 to 1999 - selected an Outstanding Reviewer - 1996. Director for the Managerial Consultation Division 1999 to 2001.  
Eastern Academy of Management member 1998 and continuing - Treasurer 1995-1998, member of 1995 Program Committee, 1991 track chair for Entrepreneurship, Small Business, and Technology Management.  
Association of Management – 1988 to 1992 - 1991 Strategic Management track chair  
Institute of Management Accountants – member and member of CMA exam review staff 1986-1989  
American Accounting Association – 2001 to 2002  
Institute of Applied and Behavioral Management - Vice President for Finance, 1993 to 1996.  
North American Case Research Association – 1992 and continuing  
National Association of Forensic Economics – 1996 and continuing  
The Case Association (formerly the Eastern Case Writers Association) - Director 1990-1991, Vice President-Program 1991-1993, President 1993 to 1996, Treasurer 1996 to 2006. Selected as the first Fellow of the organization.  
Association of Collegiate Entrepreneurs – 1987 to 1990  
Small Business Institute Directors Association – 1987 to 1994  
United States Association for Small Business & Entrepreneurship – 1988 and continuing  
International Association of Business Disciplines – 1988 to 2002  
American Association of University Professors 1988 to 1995 - local chapter Treasurer - 1992-4, Vice President 1994.  
Association for Retarded Citizens - Somerset County, member 1979 and continuing - Chief Financial Officer and Member of Board of Directors, 1980-1986.  
MENSA - International Society of Persons with High IQs – 1976 and continuing.  
New Jersey Society of CPAs - Fellow as of February 1993, Educators Committee – 2002-2012 (chair 2009-2011), Professional Conduct/Ethics Committee 2005-2018, 2020 and continuing, Scholarship Committee – 2004 - 2012.

**Publications**

"An Organization Study of The American Society of Travel Agents" Travel Agent Magazine, March 1973.  
Coauthored as an employee of Deloitte & Touche.

"CenPointe Devices, Inc." Certified Management Accountant Examination December 1986 Questions and Unofficial Answers, Institute of Certified Management Accountants, 1987.

Control Methodologies for Achievement of Strategic Objectives, University Microfilms International, Ann Arbor, Michigan, 1988.

"Allied Charge, Inc." Certified Management Accountant Examination June 1987 Questions and Unofficial Answers, Institute of Certified Management Accountants, 1988.

"Parkside School District" Certified Management Accountant Examination June 1987 Questions and Unofficial Answers, Institute of Certified Management Accountants, 1988.

"Central Foundry" Certified Management Accountant Examination June 1987 Questions and Unofficial Answers, Institute of Certified Management Accountants, 1988.

"Strategy's Effects on the Choice of Management Control Approach" - Proceedings of the 1988 annual meeting Association of Management in October 1988, Long Beach, CA. As noted in the Proceedings, this paper was awarded the Best Paper Award in the Strategic Management division.

"EraTech Corporation" Certified Management Accountant Examination December 1987 Questions and Unofficial Answers, Institute of Certified Management Accountants, 1988. This case has also been published within several accounting textbooks, including:  
Rayburn, Gayle L. Principles of Cost Accounting (4th edition), Irwin Publishers, 1989 (page 34),  
and  
Barfield, Jesse T., Cecily A. Raiborn, and Michael A. Dalton Cost Accounting: Traditions and Innovations, West Publishing Co., 1991 (pages 21-22).

"The Choice of Approach to Management Control as an Element of Strategy" - a chapter within Readings and Cases in Strategic Management by Herbert Sherman, Ginn Press, 1989.

"Delaware City" Certified Management Accountant Examination June 1988 Questions and Unofficial Answers, Institute of Certified Management Accountants, 1989.

"Interpersonal Communication Models" Certified Management Accountant Examination June 1988 Questions and Unofficial Answers, Institute of Certified Management Accountants, 1989.

"Atlantis Laboratories" Certified Management Accountant Examination June 1988 Questions and Unofficial Answers, Institute of Certified Management Accountants, 1989.

"Spiral Laboratories" Certified Management Accountant Examination June 1989 Questions and Unofficial Answers, Institute of Certified Management Accountants, 1990.

"Organizational Conflict" Certified Management Accountant Examination June 1989 Questions and Unofficial Answers, Institute of Certified Management Accountants, 1990.

"Corporate Cost Allocation" Certified Management Accountant Examination June 1989 Questions and Unofficial Answers, Institute of Certified Management Accountants, 1990.

"Franchising Economics" Certified Management Accountant Examination December 1989 Questions and Unofficial Answers, Institute of Certified Management Accountants, 1990.

"Political Behavior" Certified Management Accountant Examination December 1989 Questions and Unofficial Answers, Institute of Certified Management Accountants, 1990.

"Almost Home Cookin'" Certified Management Accountant Examination December 1989 Questions and Unofficial Answers, Institute of Certified Management Accountants, 1990.

"Bill Scanlon's Heartache: The Chronicle of an Entrepreneur" - a case study submitted to the University of Illinois' Journal of Management Case Studies. (Coauthor).

"Columbia Picture Feature Film Operation - a strategic analysis" - a case study submitted to the Journal of Management Case Studies.

"An Introduction to Desktop Publishing - including Software Reviews and Recommendations" - submitted to Management Accounting. (Coauthor).

"MiniMicroSoft Corporation" Certified Management Accountant Examination June 1989 Questions and Unofficial Answers, Institute of Certified Management Accountants, 1990.

"Low Cost Marketing Research" The Bell Business Report, April 1990.

"Competitive Intelligence" The Bell Business Report May 1990.

"Self-Employment Tax Strategies" The Bell Business Report, June 1990.

"Strategic Profiling of Business Units: A Standardized Presentation Format for Use in a Large Group Setting" - The Association of Management - Annual National Conference Proceedings – 1991 (Multi-Disciplinary - volume II), in August 1991, Atlantic City, NJ.

The 1992 Proceedings of Cases in Progress - Eastern Case Writers (editor), meetings at Cambridge, Massachusetts in April 1992 and Baltimore, Maryland, May 1992.

"Towards a New Taxonomy of Humor" 1992 Proceedings of The Urban Business Association, April 1992, Baltimore, MD.

"Recruiting and Selecting Student Assistance for Operating 'Downsized' Small Business Institutes" (co-authored with Dr. Herbert Sherman of Marist College) published in the Proceedings and Addendum of the 1993 Regional SBIDA Meeting, New York City, October 1992.

"The Effect of Strategy on Preference for Managerial Control Systems" 1992 Proceedings of The Eastern Academy of Management, May 1992, Baltimore, MD.

The 1993 Proceedings of Cases in Progress - Eastern Case Writers (associate editor) - meetings at Philadelphia, Pennsylvania in March 1993 and Providence, Rhode Island, May 1993.

Who's Who in Small Business and Entrepreneurship - Worldwide: The Official Membership Registry of the International Council for Small Business (editor) - published Spring 1993.

"Course and Curriculum Designs for Transnational Small Business," published in 1993 Proceedings of The International Council for Small Business.

"Managerial Responsibilities Within the Legal Process: Towards a Definition of Frivolous Lawsuits," published in 1993 Proceedings of The International Association of Business Disciplines (held from 1992).



"A Comparative Analysis of Instructional Methodologies in Small Business/Entrepreneurship: Role-Play, Computer Simulation, and Case Study," published in 1993 Proceedings of The International Association of Business Disciplines.

"Legal Challenges for Small Business: Frivolous Lawsuits" (co-authored with Herbert Sherman), 1993 Proceedings of the Small Business Institute Directors Association, San Diego, California.

"The Use of Varied Teaching Approaches to College Business Courses," published in 1993 Proceedings of The Urban Business Association - abstract.

"Internationalizing the Small Business Curriculum," a two-day seminar/symposium sponsored by World Trade Council, the American Assembly of Collegiate Schools of Business (AACSB), and others at Wichita State University, Wichita, Kansas - Feb. 21 and 22, 1992.

"Why Not Get Started Writing Cases," a symposium presented at the Urban Business Association meeting, Baltimore, MD, April 25, 1992.

"Transnational Small Business Curriculum Design" - a presentation given at the International Small Business Congress in October 1992 in Warsaw, Poland.

"Strategic Profiling of Business Units: A Standardized Approach for Use in Large Group Settings" published with the Instructors Resource Manual accompanying Strategic Management: A Methodological Approach (fourth edition) by Alan Rowe, Richard O. Mason, Karl E. Dickel, Richard B. Mann, and Robert J. Mockler, Addison-Wesley, 1994.

"Challenges in the Development and Application of Small Business Cases" (workshop abstract), 1994 Proceedings of the Small Business Institute Directors Association, San Antonio, Texas.

"Converting Small Business Institute Reports into Publishable Cases" (workshop abstract), 1994 Proceedings of the Small Business Institute Directors Association, San Antonio, Texas.

"The Marriott Corporation and Technology," a case study selected in 1994 for future use by Regents College, Albany, New York on the nationwide ACT Examination in Business Policy and Planning.

"Practitioner Liaison" column in the February 1994 edition of The Management Education Division Newsletter ("MED") of the Academy of Management.

"Litigation Support and Management Consulting" 1994 Proceedings of The Institute of Behavioral and Applied Management, Washington, DC, October 1994.

The 1994 Proceedings of Cases in Progress (volume 1, Number 1) - Eastern Case Writers (associate editor) - meeting at Portsmouth, New Hampshire in April 1994.

The 1994 Proceedings of Cases in Progress (volume 1, Number 2) - Eastern Case Writers (associate editor) - meeting at Albany, New York, in May 1994.

"IBM and the CMA Review Course" (with Norman Foy) 1995 Proceedings of Cases in Progress no. 2, Spring 1995, an instructional case and teaching note.

"Where the Jobs Are! New Areas Requiring CPA Expertise" Tomorrow's CPA, NJ Society of CPA's, Spring 1995

The 1995 Proceedings of Cases in Progress (volume 95, Number 1) - Eastern Case Writers (associate editor) - meeting at Providence, Rhode Island in April 1995.

The 1995 Proceedings of Cases in Progress (volume 95, Number 2) - Eastern Case Writers (associate editor) - meeting at Ithaca, New York, in May 1995.

"IBM Skill Dynamics and the CMA Review Course" abstract published in The 1994 Proceedings of the World Association for Case Method Research and Application, Montreal, June 1994.

Session Chair "Financing Entrepreneurial Ventures" 1994 annual meeting of The Academy of Management, Dallas, August 1994.

Discussant "Theory with Practice: A Postmodern Synthesis for management Education" 1994 annual meeting of The Academy of Management, Dallas, August 1994.

"Real Time Case Learning" - a symposium (with John Seeger and Barry Armandi) as part of the Academy of Management Teaching Enhancement conference April 1995 in Chicago.

"Case Learning: Muddling Through Yet Theory Based" as part of a symposium entitled "Where Our Teaching Methods are and Where They're Going" (with Joseph Wolfe, Jean Bartunek, David Fearon) at the May 1995 meeting of the Eastern Academy of Management in Ithaca, New York.

"Forensic Accounting as a Career Choice for Accounting Students" - a part of a panel presentation at Pace University, Manhattan Campus, April 1995.

VIP Case Reviewer, a session with 5 case reviews in a round-table session, the Eastern Case Writers Association May 1995 meeting in Ithaca, New York.

Program Chair (acting), Annual Eastern Case Writers, March 1995 meeting in Providence, Rhode Island.

Program Chair (acting), Annual Eastern Case Writers, May 1995 meeting in Ithaca, New York.

Discussant "Preventing Plagiarism in Management Education" 1995 annual meeting of The Academy of Management, Management Education and Development Division, Vancouver, August 1995.

Session Chair "Innovation and Product Championing" 1995 annual meeting of The Academy of Management, Entrepreneurship Division, Vancouver, August 1995.

Session Chair "Emerging Issues in Management Consulting" 1995 annual meeting of The Academy of Management, Managerial Consultation Division, Vancouver, August 1995.

Contributor of questions, Uniform CPA Examination - Questions and Unofficial Answers, November 1995 edition.

"Career Choices: Alternate Model of the Academic Experience" within the Doctoral Consortium, May 1996 meeting of the Eastern Academy of Management, Arlington, Virginia.

Presenter within the "VIP Review" at the May 1996 meetings of the Eastern Case Writers Association and Eastern Academy of Management, Arlington, Virginia.

Paper Discussant "Philosophies of Management Education" Management Education Division, Annual Meeting of The Academy of Management, Cincinnati, Ohio, August 1996.

Session Chair "Consultation and Organizational Design," Managerial Consultation Division, Annual Meeting of The Academy of Management, Cincinnati, Ohio, August 1996.

Presenter within the "VIP Review Session" at the April 1997 meetings of the Eastern Case Writers Association and Northeast Decision Sciences Institute, Annapolis, Maryland.

"Teaching with Cases" (a symposium with John Pearce and John Seeger), May 1996 Annual Meeting of The Eastern Academy of Management, Arlington, Virginia.

"The Case as a Foundation for Experiential Learning" - a symposium with Jay Bender, Joel Harmon, and Herb Sherman, May 1997 Annual Meeting of The Eastern Academy of Management as published in the 1997 Proceedings of The Eastern Academy of Management, New Brunswick, New Jersey, May 1997.

Case discussant "Silva Seafood, Inc." at the May 1997 meeting of the Eastern Case Writers Association (ECWA) Eastern Academy of Management (EAM) in New Brunswick, New Jersey, May 1997.

Paper Discussant "Innovations and New Perspectives in Case Study Pedagogy" Management Education Division, Annual Meeting of The Academy of Management, Boston, Massachusetts, August 1997.

Paper Discussant "Enhancing Learning in Consulting" Managerial Consultation Division, Annual Meeting of The Academy of Management, Boston, Massachusetts, August 1997.

Paper Discussant "Performance: The Fundamental Dependent Variable in New and Small Venture Research" Management Education Division, Annual Meeting of The Academy of Management, Boston, Massachusetts, August 1997.

Presenter within the "VIP Review session" at the May 1998 meeting of the Case Association and Eastern Academy of Management, Springfield, Massachusetts. VIP reviews were published in the 1998 Proceedings of Cases in Progress of the Case Association.

Discussant (4 papers) "Managing Consulting Firms" Managerial Consultation Division, Annual Meeting of The Academy of Management, San Diego, California, August 1998.

Discussant (2 papers) "Computers in Management Teaching" Management Education Division, Annual Meeting of The Academy of Management, August 1998.

"Decision Making in an organizational setting: Cognitive and organizational influences on risk assessment in commercial lending: A research translation" The Academy of Management Executive (November 1998).

Presenter within the "VIP Review session" at the March 1999 meeting of the Case Association and Northeast Decision Science Institute, Newport, Rhode Island. VIP reviews were published in the 1999 Proceedings of Cases in Progress of the Case Association.

Presenter within the "VIP Review session" at the May 1999 meeting of the Case Association and Eastern Academy of Management, Philadelphia, Pennsylvania. VIP reviews were published in the 1999 Proceedings of Cases in Progress of the Case Association.

Discussant (3 papers) "New Paradigms for Consultation" Managerial Consultation Division, Annual Meeting of The Academy of Management, Chicago, Illinois, August 1999.

*Investigating Entrepreneurial Opportunities: A Practical Guide to Due Diligence* (co-authored with Richard Green), Sage Publications, 2000.

Presenter within the "VIP Review session" at the May 2001 meeting of the Case Association and Eastern Academy of Management, New York, New York. VIP reviews were published in the 2001 Proceedings of Cases in Progress of the Case Association.

Presenter within the "VIP Review session" at the May 2002 meeting of the Case Association and Eastern Academy of Management, New Haven, Connecticut.

Co-author (primary author Harry Nolan, Ph.D.) *A Market Research Demand Analysis of the 2002 Seaside Heights New Jersey Summer Tourism Market*, March 2003.

Presenter at the April 2003 annual meeting of the New Jersey Association of Trial Lawyers "The Economic Construction and Evaluation of the Family Support Unit" as published within their *Proceedings*.

Presenter within the "VIP Review session" at the May 2003 meeting of the Case Association and Eastern Academy of Management, Baltimore, Maryland.

"Add Value to your Claims" published in the *New Jersey Lawyer* on 18 August 2003.

Presenter within the "VIP Review session" at the May 2004 meeting of the Case Association and Eastern Academy of Management, Providence, Rhode Island.

"A Primer on Case Reviewing" *The Case Journal* (electronic), Fall 2004.

"Case Research, Writing & Teaching" – a presentation made to the School of Business faculty at Kutztown University, Kutztown, Pennsylvania, April 2005.

Featured Session entitled "VIP Reviewing session" at the May 2005 meeting of the Case Association and Eastern Academy of Management, Springfield, Massachusetts. This session included a presentation of an intensified case review and invited presentation of my "Primer" article.

A book review of *The Power of Problem-Based Learning*, Barbara J. Duch, Susan E. Groh, and Deborah E. Allen (Eds.). Sterling, VA: Stylus Publishing, 2001 in the June 2005 edition of the Academy of Management *Learning & Education Journal*, volume 4, number 2.

Edited of a section of Volume 2, Number 2 (Fall 2005) of the *Organization Management Journal* dedicated to Teaching and Learning using cases supplied by the CASE Association.

"The Anatomy of an Instructional Case from a Reviewers Perspective" *The Case Journal* (electronic), Fall 2005.

"Case Research, Writing & Teaching" – a presentation made to the School of Business faculty at Ramapo College, Mahwah, New Jersey, December 2007.

"NJ Law & Ethics for CPAs" the only required continuing professional education course for NJ CPAs - approved by action of the New Jersey State Board of Accountancy, approved by the continuing professional education committee and the full NJ State Board of Accountancy June 2006.

"NJ Law & Ethics for CPAs" the only required continuing professional education course for NJ CPAs - approved by action of the New Jersey State Board of Accountancy, approved by the continuing professional education committee and the full NJ State Board of Accountancy, March 2009.

"Independence Impaired but Still Objective: The Proposed New SSARS Standard" (co-author) NJ Society of CPAs August 25, 2009.

"The State of Practice Mobility," *NJ CPA*, March-April 2011.

"NJ Law & Ethics for CPAs": the only required continuing professional education course for NJ CPAs - approved by action of the New Jersey State Board of Accountancy, approved by the continuing professional education committee and the full NJ State Board of Accountancy, February 2012.

"Corporate Fraud: Discovery and Control" – a 4-hour in-person continuing professional education course designed and delivered to NASBA standards. First presented in May 2012 and delivered to CPAs on a regular basis.

"Enterprise Risk Management: An Introduction" (with Anne Marchetti) – a 4-hour in-person continuing professional education course designed and delivered to NASBA standards. First presented in December 2012 and delivered to CPAs on a regular basis.

"Business Ethics: Dilemmas and Solutions" – a 4-hour in-person continuing professional education course designed and delivered to NASBA standards. First presented in May 2013 and delivered to CPAs on a regular basis.

"Enterprise Risk Management: Applications" (with Anne Marchetti) – a 4-hour in-person continuing professional education course designed and delivered to NASBA standards. First presented in September 2013 and delivered to CPAs on a regular basis.

"Control Concepts: Tools for Staying on Track" – a 4-hour in-person continuing professional education course designed and delivered to NASBA standards. First presented in July 2013 and delivered to CPAs on a regular basis.

"Enterprise Risk Management: Practices" (with Anne Marchetti) – a 4-hour in-person continuing professional education course designed and delivered to NASBA standards. First presented in December 2013 and delivered to CPAs on a regular basis.

"NJ Law & Ethics for CPAs": The only required continuing professional education course for NJ CPAs - approved by action of the New Jersey State Board of Accountancy, approved by the continuing professional education committee and the full NJ State Board of Accountancy, April 2015.

"Code of Conduct: More than Just a Book of Rules" *NJCPA Magazine*, January 2017.

"NJ Law & Ethics for CPAs" the only required continuing professional education course for NJ CPAs - approved by action of the New Jersey State Board of Accountancy, approved by the continuing professional education committee and the full NJ State Board of Accountancy, April 2018.

Online delivery authorization for the "NJ Law & Ethics for CPAs" course by

- NJ State Board of Accountancy – January 2020
- National Association of State Boards of Accountancy – January 2020

"NJ Law & Ethics for CPAs," the only required continuing professional education course for NJ CPAs - approved by action of the New Jersey State Board of Accountancy, approved by the continuing professional education committee and the full NJ State Board of Accountancy, every three years since 2020.

"NJ Law & Ethics for CPAs," the only required continuing professional education course for NJ CPAs - approved by action of the New Jersey State Board of Accountancy, approved by the continuing professional education committee and the full NJ State Board of Accountancy, every three years since 2024.

**Author of Proprietary Pre-Publication Reviews of Textbooks on Entrepreneurship, Management, and Accounting Including:**

Richard M. Hodgetts and Donald F. Kuratko, *Entrepreneurship - A Contemporary Approach*, Dryden Press, 1987.

Ted Roselius, *Entrepreneurship - Owning Your Own Business*, Richard D. Irwin Publications, Inc. 1987.

Robert Anderson and John Dunkelberg, *Designing Business Start-ups*, Harper & Row, 1988.

- W. M. Greenfield, *Developing New Ventures*, Harper & Row, 1988.
- John R. Schemmerhorn, *Management for Productivity*, 3rd edition, John Wiley & Sons, 1989.
- Bernard Keys & Robert A. Wells, *Microtronics - An Adventure in Corporate Management* (simulation software and related documentation), John Wiley & Sons, 1989.
- Fred L. Fry, *Entrepreneurship: A Business Plan Approach*, South-Western Publishers, 1990.
- Daniel F. Jennings, *Entrepreneurship and Corporate Revitalization: Multiple Perspectives*, South - Western Publishers, 1991.
- Karl H. Vesper, *New Venture Mechanics*, Prentice-Hall, 1991.
- Norman M. Scarborough & Thomas W. Zimmerman, *Entrepreneurship and Small Business Management* (3rd edition), Macmillan Publishing Company, 1991.
- Larson & Thuerbach, *Entrepreneurship*, Macmillan Publishing Company, 1991.
- Knight, *Entrepreneurship, and Innovation*, John Wiley & Sons Publishers, September 1992.
- Mockler, *Integrative Enterprise Management*, Van Nostrand Reinhold, March 1993.
- Vroman and Luchsinger, *Managing Organizational Quality*, Richard D. Irwin Publishers, May 1993.
- Karl H. Vesper, *New Venture Cases*, Southwestern Publishers, April 1993.
- Kharbanda and Pinto, *Successful Project Management*, Van Nostrand, November 1993.
- Turban, Ephraim, McLean and Wetherbe, *Management Information Systems*, John Wiley & Sons, Inc., February 1994.
- Katsioloudes, Nale & Kuhlman, *Strategic Management*, John Wiley & Sons, May 1994.
- Kharbanda and Pinto, *Project Failures: Lessons for Project Management*, Van Nostrand, August 1994.
- Ajami and Kruger, *Entrepreneurship and Global Competitiveness*, John Wiley & Sons, July 1995.
- Kharbanda and Pinto, *What Made Gertie Gallop: Lessons from Project Failures*, Van Nostrand, January 1996.
- Roth & Kleiner, *The Learning Histories Library*, Oxford University Press, December 1997.
- Buckless, *Auditing Cases*, Prentice Hall, March 1999.
- Anonymous author, *Forensic Accounting*, Prentice Hall, June 1999.
- Zeigenfuss, *Organizational and Management Problem Solving*, Sage Publications, July 1999.
- Karahan, *Global Business Management*, South-Western/International Thomson Publishing, July 1999.
- Galante, *Joseph Internal Audit & Fraud Awareness for Management* Prentice Hall, November 1999.

Symposium presenter "Management Consultants and the Challenges of the 1990's" - 1988 annual meeting of the Association of Management, Long Beach, California, October 1988.

Symposium presenter "Public versus Private Strategic Management: Comparative Practices and a Case Study" - annual meeting of the Association of Management, Boston, Massachusetts, November 1989.

Symposium presenter "The Pedagogy of Strategic Management: A Forum for Discussion" - 1990 annual meeting of the Association of Management, Orlando, Florida, August 1990.

Author of a discussant paper to papers presented by Ian MacMillan, Jerome Katz, and William B. Gartner in a symposium entitled "New Approaches to Entrepreneurship Research" - August 1988 annual meeting of the Academy of Management, Anaheim, Ca.

Session Chair "Strategic Management and Strategic Thinking" - 1988 annual meeting of the Human Resource Management / Organization Behavior Association, Long Beach, California, October 1988.

Session Chair "The Development of Entrepreneurial Expertise" - August 1990 annual meeting of the Academy of Management, San Francisco, Ca.

Dr. James J. Carroll, CPA

Session Chair "Innovations in Course Design" - May 1990 annual meeting of the Eastern Academy of Management, Buffalo, NY.

Session Chair "Technology and Innovation" - May 1991 annual meeting of the Eastern Academy of Management, Hartford, CN.

Discussant "Small Business Tax Concerns" - June 1990 annual meeting of the International Council for Small Business, Washington, DC.

Discussant "Venturing: Entry Strategies and Other Issues" - annual meeting of the Academy of Management, Entrepreneurship Division, August 1991, Miami, FL.

Discussant "Consulting Applications" - annual meeting of the Academy of Management, Management Consultation Division, August 1991, Miami, FL.

Discussant "External Environments" - August 1990 annual meeting of the Association of Management, Orlando, Fla.

Discussant "Life Cycles and Competition" - August 1990 annual meeting of the Association of Management, Orlando, Fla.

Session Chair "Effective and Competitive Strategies" - August 1990 annual meeting of the Association of Management, Orlando, Fla.

Reviewer of papers submitted to referee process for the Journal of Small Business Management - approximately 40 papers reviews per year.

Reviewer and referee of papers research papers submitted - 1988, 1989, 1990, 1991, 1992, 1993, 1994, 1995, and 1996 annual meetings of the Academy of Management - Entrepreneurship, Management Education, and Management Consultation Division.

Reviewer and referee of papers research papers submitted - 1990, 1991, 1992 & 1993 - annual meetings of the US Association for Small Business & Entrepreneurship.

Reviewer of papers submitted to referee process - 1990 and 1991 annual meetings of the Association of Management.

Received and acted as Project Director of a \$60,000 New Jersey Department of Higher Education grant plus matching college funds concerning the use of computers in the business curriculum - William Paterson College 1986-1988.

Acted a Project Director 1987-1988 Faculty Development Grant program - William Paterson College involving scholarly inquiry and educational delivery systems.

Participant and Presenter - William Paterson College "Writing Across the Curriculum" Symposium series - 1987-1988.

Participant - 1991 World Congress of the International Council for Small Business (ICSB), June 1991, Vienna, Austria.

**Continuing Professional Education**

As required to maintain my CPA license and other professional designations, I earned approximately 50-60 CPEs (one CPE = one hour) each year in technical and professional courses.

**Awards and Grants**

Selected to be an honored faculty member of the Delta Mu Delta Honor Society, 2009.

Winner 1986 Freedoms Foundation at Valley Forge Award for Excellence in Entrepreneurial Education.

Winner \$7,500 Leavey Award for 1987 for Excellence in Private Enterprise Education from the Freedoms Foundation.

Received and acted as Project Director of a \$60,000 New Jersey Department of Higher Education grant plus matching college funds for the development of computer applications in the business curriculum - 1986 to 1988.

Selected as a Citizen Ambassador in the People-to-People Exchange Program scheduled for China in June 1989, Russia 1991, and Russia 1992.

Selected as a reviewer and referee of research papers: The Academy of Management, Entrepreneurship division - 1988, 1989, 1990, 1991 & 1992; Managerial Consultation division - 1989, 1991 & 1992; The Eastern Academy of Management, 1989 and 1990; the International Council for Small Business - 1990 & 1992, the Association of Management - 1990.

Founder and organizer - William Paterson College New Venture Award program 1986-88.

Selected as a reviewer for the Certified Management Accountant Examination -June and December 1987, June and December 1988.

Selected as a grader for the Certified Management Accountant Examination - June 1986 and December 1986.

Achieved Certified Installer status - CYMA-McGraw-Hill integrated accounting and financial management software - 1988.

Achieved Certified Installer status - Computer Associates, Inc. integrated accounting and financial management software - 1987.

Selected as the Outstanding member of the editorial Board of *The Journal of Small Business Management* - 1996.

Selected as the Outstanding member of the editorial Board of *The Case Research Journal* - 2000.

Unsuccessful grant proposals:

"An Exploratory Study of Small Business Financing Alternatives" submitted to the United States Small Business Administration, 1988.

"Introductory Desktop Publishing Application" submitted to the New Jersey Department of Higher Education, 1987.

"Faculty Development in Personal Computers" submitted to the New Jersey Department of Higher Education, 1985.

**Adjunct Teaching Assignments**

1983 - William Paterson College - Cost Accounting

1986 - Fairleigh Dickinson University - Business Finance



1988 – 1998 - Florida Institute of Technology at Picatinny Arsenal - graduate-level courses taught include Managerial Accounting, Management Information Systems, Financial Management, Seminar in Finance, Technology Management, New Venture Development, Business Ethics, Managerial Computer Applications, Marketing, and Business Policy.

New Jersey Institute of Technology - 1992, 1993, and 1994 - Business Policy (graduate level) – on and off campus.

Central Michigan University – 1997 to 2001 – graduate courses in Administrative Planning & Control, Financial and Management & Control.

Stevens Institute of Technology – 2001 - 2010 – graduate courses in Managerial Accounting and Financial Management.

Fairleigh Dickinson University – 2021 and continuing - graduate and undergraduate courses in Financial Statement Auditing and Cost/ Managerial Accounting.

### **Executive and Professional Seminars conducted**

Certified Management Account (CMA) and Certified Financial Manager (CFM) review courses within corporations including:

IBM (Armonk, New York, and Chapel Hill, NC) - 1991 and 1992

AT&T (Basking Ridge, NJ) – 2000 to 2003

Enterprise Rent-A-Car (Clark, NJ) - 2003

Johnson & Johnson (New Brunswick, NJ) – 2001 to 2006

Ernst & Young (Lyndhurst, NJ) – 2003

New Jersey Law and Ethics for CPAs 2003 to 2005 – presented approximately 15 courses to groups of individual CPAs, CPAs in CPA firms, and CPAs in corporations.

New Jersey law & Ethics for CPAs 2006 to 2008 - presented this course approximately 65 courses to groups of individual CPAs, groups of CPAs in CPA firms, and groups of CPAs in corporations.

New Jersey law & Ethics for CPAs 2009 to 2011 - presented this course approximately 25 courses per year to groups of individual CPAs, groups of CPAs in CPA firms, and groups of CPAs in corporations.

New Jersey law & Ethics for CPAs 2012 to 2014 - presented this course approximately 25 courses per year to groups of individual CPAs, groups of CPAs in CPA firms, and groups of CPAs in corporations.

New Jersey Law & Ethics for CPAs 2015 to 2017 - presented this course approximately 25 courses per year to groups of individual CPAs, groups of CPAs in CPA firms, and groups of CPAs in corporations.

New Jersey Law & Ethics for CPAs 2018 and continuing - presented this course approximately 25 courses per year to groups of individual CPAs, groups of CPAs in CPA firms, and groups of CPAs in corporations.

### **Listings**

Who's Who - Worldwide - 1993/94 and 1994/95

Who's Who in Small Business & Entrepreneurship - Worldwide - 1993, 1994

Who's Who in Finance and Industry 1998 - 1999, (Marquis)

Who's Who in The World 2000, (Marquis)

Dr. James J. Carroll, CPA

**Trade Press Citations**

"Put Numbers on Your Side" by Jeannie Mandelker in Your Company Magazine, January 1994, pp. 33 and 34.