

Adam Vitalis, Ph.D., MBA, CIA, CPA (MN)
Robert Harding Research Leadership Fellow
University of Waterloo
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Education

The University of Wisconsin – Madison, Madison, WI
Doctor of Philosophy in Accounting, 2012

New York University, Leonard N. Stern School of Business, New York, NY
Master of Business Administration, 2005

University of San Diego, San Diego, CA
Bachelor of Accountancy, 1994

St. Claire College, Oxford, England
Spring Semester Abroad, 1993

Academic Experience

University of Waterloo, School of Accounting and Finance, Waterloo, ON
Associate Professor, 2024 – Current

University of Waterloo, School of Accounting and Finance, Waterloo, ON
Assistant Professor, 2017 – 2024

Georgia Institute of Technology, Scheller College of Business, Atlanta, GA
Assistant Professor, 2012 – 2017

University of Wisconsin – Madison, Madison, WI
Instructor, 2007 – 2012
Course Coordinator, 2007 – 2012
Research Assistant, 2007 – 2012

Professional Experience

U.S. Bancorp, Minneapolis, MN

Director of Enterprise Risk Management, 2006 – 2007

Deloitte & Touche, LLP, New York, NY and Minneapolis, MN

Senior Manager, Audit and Enterprise Risk Services, 2003 – 2006

Various studios and locations

Production Accountant / Auditor, Film and Television, 1996 – 2002

Deloitte & Touche, LLP, Minneapolis, MN

Staff Auditor, 1994 – 1995

Research

Research Interests

My research seeks to deepen the understanding of audit and sustainability decision-making. I focus on researching how cognitive limitations affect risk processing and information cues in audit and financial reporting at the intersection of economics, behavioural science, and information processing. By focusing on the impact of factors such as incentives, norms, personal traits, and regulations on information processing, I seek to challenge established norms and enrich policy, theory, and practice.

Dissertation

Vitalis A., Business Risk and Audit Risk: An Integrated Model with Experimental Boundary Test.

- Dissertation cited in Professor Rittenberg's testimony at the "PCAOB Public Meeting on Firm Independence and Rotation," October 18, 2012.

Publications

Appiah, A., ElAlfy, A., Vitalis, A., and Weber, O., “An Assessment of Sustainable Banking Performance in Sub-Saharan Africa-Does Doing Good and Doing Well Go Hand in Hand?” June 2025, accepted to *Corporate Social Responsibility and Environmental Management*.

Saravade, V., Vitalis, A., and Weber, O., “To Label or Not? A Choice Experiment Testing Whether Labelled Green Bonds Matter to Retail Investors.” January 2025, accepted to *Humanities & Social Sciences Communications*. <https://www.nature.com/articles/s41599-025-04395-w>

Bauer, T., Boritz, E., Fiolleau, K., Pomeroy, B., Vitalis, A., and Wang, P. 2024, “Cataloguing the Marketplace of Assurance Services.” *Auditing: A Journal of Practice and Theory* Vol. 43 No. 3, pp. 49-75. <https://doi.org/10.2308/AJPT-2022-196>

Bhaskar, L., Majors, T., and Vitalis, A. 2023, “How Does Depletion Interact with Auditors’ Skeptical Dispositions to Affect Auditors’ Challenging of Managers in Negotiations?” *Contemporary Accounting Research* Vol. 40, No. 4, pp. 2288-2313. <https://doi.org/10.1111/1911-3846.12891>

Johnson, J., Theis, J., Vitalis, A., Young, D., 2023. “Greenhouse Gas Disclosure Research: A Look Back and Look Forward.” *Accountability in a Sustainable World Quarterly*, Issue 4, pp. 133 - 140. <https://care-mendoza.nd.edu/accountability-in-a-sustainable-world-quarterly/issue-4---september-2023/>

Vitalis, A., Boritz, E., and Simeoni, L. 2023, “Enhancing CPA Competencies for Internal Audit Roles.” *International Journal of Auditing*. <https://doi.org/10.1111/ijau.12337>

Brown, V., Gissel, J., and Vitalis, A., 2022. “Mandatory Disclosure of Engagement Partner Identity: Insights from Practice.” Received SAF Small Research Grant. *Accounting Perspectives*. December 2022, Vol. 21, No. 4, pp. 697-728. <https://doi.org/10.1111/1911-3838.12308>

Johnson, J., Theis, J., Vitalis, A., Young, D., 2022. “Your Emissions or Mine? Examining How Emissions Management Strategies, ESG Performance, and Targets Impact Investor Perceptions.” *Journal of Sustainable Finance & Investment*. <https://doi.org/10.1080/20430795.2022.2140571>

Johnson, J., Theis, J., Vitalis, A., Young, D., 2020. “The Influence of Firms’ Emissions Management Strategy Disclosures on Investors’ Valuation Judgments.” *Contemporary Accounting Research* Vol. 37 (2): 642–664. Also highlighted in the Fall 2021 *CAR* special edition on Corporate Social Responsibility: [https://onlinelibrary.wiley.com/doi/toc/10.1111/\(ISSN\)1911-3846.corporate-social-responsibility](https://onlinelibrary.wiley.com/doi/toc/10.1111/(ISSN)1911-3846.corporate-social-responsibility).

Church, B., Jiang, W., Kuang, X., Vitalis, A., 2019. “A Dollar for a Tree or a Tree for a Dollar? The Behavioral Effects of Measurement Basis on CSR Investment Decision.” *The Accounting Review*, September 2019, Vol. 94, No. 5, pp. 117-137. <https://doi.org/10.2308/accr-52332>

Vitalis A., 2019. "Ego Depletion: Overview and Implications for Ethical Choices." In: Poff, D. C., Michalos, A. M. (eds) *Encyclopedia of Business and Professional Ethics*. Springer, Cham.

Mayhew B.W., Vitalis A., 2014. "Myopic Loss Aversion and Market Experience." *Journal of Economic Behavior and Organization*, 97 (January): 113 – 125.
<https://doi.org/10.1016/j.jebo.2013.10.007>

Works in Progress

Bable, J., Kuang, X., Kugel, J., and Vitalis, A., "Don't Boss Me Around: Mandated CSR Investing and Managers' allocation decisions." The project received CPA Ontario Centre for Performance Management Research and Education Research Grant. Submitted to the European Accounting Review.

Bauer, T., Boritz, E., Fiolleau, K., Pomeroy, B., and Vitalis, A., "CPA Familiarity with Emerging Technologies and Tools" CPA Canada funded project. Under first round review at the *International Journal of Accounting Information Systems*.

Church, B., Fiolleau, K., Lane, D., and Vitalis, A., "Social and Economic Bonding in an Audit Setting." The project received SAF Small Research Grant and CPA Ontario Centre for Performance Management Research and Education Research Grant. Data collection is ongoing.

Fairchild, A., Johnson, J., Theis, J., Vitalis, A., and Young, D., "Untitled extension of ESG projects." Data collection.

Pomeroy, B., Vitalis, A., and Young, D., "Reevaluating the Effects of Auditor Uncertainty Disclosures on Investor Valuation Judgments: A Replication of Dennis, Griffin, and Zehms (2019)." The project received the 2019/20 SSHRC Insight Grant. Under first round review at AJPT.

Vitalis, A., Boritz, E., and Shields, G., "The Impact of Experience on Auditor Sensitivity to Risk Cues." Manuscript based on dissertation work. Drafting initial manuscript.

Academic Presentations

Refereed Conference Presentations

American Accounting Association Accounting, Behavior and Organizations Midyear Conference

- 2014: Presented working version of: *Are 'Good' Auditors Impacted More by Depletion? Threats to Valued Auditor Attributes*

American Accounting Association Auditing Section Midyear Conference

- 2017: Presented working version of: *Mandatory Disclosure of Engagement Partner Identity: Insights from Practice*

American Accounting Association Annual Meeting

- 2022: Presented working version of: *Enhancing CPA Competencies for Internal Audit Roles: Project Insights*
- 2016: Presented working version of: *Are 'Good' Auditors Impacted More by Depletion? Threats to Valued Auditor Attributes*
- 2012: Presented: *The Impact of Client-Specific Experience and Efficiency Pressure on Risk Assessment Effectiveness*. Working paper based on dissertation
- 2011: Presented working version of: *Myopic Loss Aversion and Market Experience*

Canadian Academic Accounting Association Annual Conference

- 2023: Presented: *How Does Depletion Interact with Auditors' Skeptical Dispositions to Affect Auditors' Challenging of Managers in Negotiations?*
- 2022: Presented working version of: *Enhancing CPA Competencies for Internal Audit Roles: Project Insights*
- 2020: Presented working version of: *Mandatory Disclosure of Engagement Partner Identity: Insights from Practice*
- 2020: Presented working version of: *Your Emissions or Mine? Examining How Emissions Management Strategies, ESG Performance, and Targets Impact Investor Perceptions*

European Accounting Association Annual Congress

- 2025: Presented: *Reevaluating the Effects of Auditor Uncertainty Disclosures on Investor Valuation Judgments: A Replication of Dennis, Griffin, and Zehms (2019)*
- 2024: Presented: *CPA Familiarity with Emerging Technologies and Tools?*

International Symposium on Audit Research (ISAR)

- 2024: Presented: *Do Non-Professional Investors Weight Auditor Disclosures in their Valuation Judgments? A Replication of Dennis, Griffin, and Zehms (2019)*

Invited Academic and Practitioner Workshops

East Coast Behavioral Accounting Workshop Seminar Series

- 2020: Presented working version of: *Your Emissions or Mine? Examining How Emissions Management Strategies, ESG Performance, and Targets Impact Investor Perceptions*

Georgia Institute of Technology Recruiting Seminar

- 2012: Presented: *The Impact of Client-Specific Experience and Efficiency Pressure on Risk Assessment Effectiveness*. Working paper based on dissertation

Georgia Institute of Technology Seminar Series

- 2017: Presented working version of: *Mandatory Disclosure of Engagement Partner Identity: Insights from Practice*
- 2016: Presented working version of: *The Influence of Firms' Emissions Management Strategy Disclosures on Investors* (early version)
- 2014: Presented working version of: *Are 'Good' Auditors Impacted More by Depletion? Threats to Valued Auditor Attributes*

Indiana University Recruiting Seminar

- 2012: Presented: *The Impact of Client-Specific Experience and Efficiency Pressure on Risk Assessment Effectiveness*. Working paper based on dissertation

Institute of Internal Auditors (IIA) Canada National Conference

- 2021: Presented working version of: *Enhancing CPA Competencies for Internal Audit Roles: Project Insights*

Institute of Internal Auditors (IIA) Toronto Symposium

- 2024: *Internal Audit Technology Integration*

Johannes Gutenberg-Universität Mainz Seminar Series

- 2015: Presented working version of: *How Does Depletion Interact with Auditors' Skeptical Dispositions to Affect Auditors' Challenging of Managers in Negotiations?*

Lazaridis School of Business & Economics, Wilfrid Laurier University

- 2024: Presented *Do Non-Professional Investors Weight Auditor Disclosures in their Valuation Judgments? A Replication of Dennis, Griffin, and Zehms (2019)*

Mercator School of Management (Universität Duisburg-Essen) Seminar Series

- 2015: Presented working version of: *How Does Depletion Interact with Auditors' Skeptical Dispositions to Affect Auditors' Challenging of Managers in Negotiations?*
- 2015: Presented working version of: *Are 'Good' Auditors Impacted More by Depletion? Threats to Valued Auditor Attributes*

Miami University Recruiting Seminar

- 2012: Presented: *The Impact of Client-Specific Experience and Efficiency Pressure on Risk Assessment Effectiveness*. Working paper based on dissertation

Saint Mary's University, Sobey School of Business Seminar Series

- 2021: Presented working version of: *Mandatory Disclosure of Engagement Partner Identity: Insights from Practice*

University of Arizona Recruiting Seminar

- 2012: Presented: *The Impact of Client-Specific Experience and Efficiency Pressure on Risk Assessment Effectiveness*. Working paper based on dissertation

University of Denver - Daniels College of Business

- 2026: Presented working version of: *Reevaluating the Effects of Auditor Uncertainty Disclosures on Investor Valuation Judgments: A Replication of Dennis, Griffin, and Zehms (2019)*

University of Hawaii Recruiting Seminar

- 2017: Presented working version of: *A Dollar for a Tree or a Tree for a Dollar? The Behavioral Effects of Measurement Basis on CSR Investment Decision*

University of Massachusetts – Amherst Recruiting Seminar

- 2012: Presented: *The Impact of Client-Specific Experience and Efficiency Pressure on Risk Assessment Effectiveness*. Working paper based on dissertation

University of Mississippi Seminar Series

- 2014: Presented working version of: *Are 'Good' Auditors Impacted More by Depletion? Threats to Valued Auditor Attributes*

University of South Carolina Recruiting Seminar

- 2016: Presented working version of: *A Dollar for a Tree or a Tree for a Dollar? The Behavioral Effects of Measurement Basis on CSR Investment Decision*
- 2012: Presented: *The Impact of Client-Specific Experience and Efficiency Pressure on Risk Assessment Effectiveness*. Working paper based on dissertation

University of Waterloo Seminar Series

- 2018: Presented working version of: *The Influence of Firms' Emissions Management Strategy Disclosures on Investors*
- 2017: Presented working version of: *A Dollar for a Tree or a Tree for a Dollar? The Behavioral Effects of Measurement Basis on CSR Investment Decision*

University of Wisconsin – Madison Preparation Presentation for Recruiting Seminars

- 2012: Presented: *The Impact of Client-Specific Experience and Efficiency Pressure on Risk Assessment Effectiveness*. Working paper based on dissertation

UWCISA Symposium on Information Integrity and Information Systems Assurance

- 2021: Presented working version of: *Enhancing CPA Competencies for Internal Audit Roles: Project Insights*

Villanova University Recruiting Seminar

- 2012: Presented: *The Impact of Client-Specific Experience and Efficiency Pressure on Risk Assessment Effectiveness*. Working paper based on dissertation

Invited Discussions at Refereed Conferences

Accounting Perspectives Emerging Scholar Symposium

- 2025

American Accounting Association Accounting, Behavior and Organizations Midyear Conference

- 2012, 2013, 2014, 2015

American Accounting Association Annual Meeting

- 2012, 2016

American Accounting Association Auditing Section Midyear Conference

- 2014, 2017, 2019, 2020, 2024

Canadian Academic Accounting Association Annual Conference

- 2020, 2022, 2023, 2024

European Accounting Association Annual Congress

- 2024

Sustainability, ESG, and Value Creation Conference

- 2024

UW/Strathclyde Joint Virtual Research Colloquium

- 2020

Other Conference Attendance

- EAA EFRAG ISSB Sustainability Reporting Standards Education Workshop (2026)
- Accountability in a Sustainable World (2024, 2025)
- Canadian Academic Accounting Association Annual Conference (2025)
- TechHorizons (2024, 2025)
- Hub for Sustainability Integration Conference (2024, 2025)
 - Planning committee and attendee
- American Accounting Association Accounting, Behavior and Organizations Midyear Conference (2024)
- Pension Fund Internal Audit Peer Conference (2024)
- IFRS Sustainability Symposium (2023, 2024)
- AAA Sustainability, ESG, and Accounting (2024, 2025)
- Accounting Association Auditing Section Midyear Meeting (2024)
- Centre for Accounting Ethics and CPA Canada Ethics Symposium (2019, 2022, 2024)

- CPA Ontario Centre for Performance Management Research and Education (CPMRE) Conference (2018, 2019, 2021, 2023)
- Assurance (UWCISA) Biennial Research Symposium (2017, 2019, 2021, 2023, 2025)
- Contemporary Accounting Research (CAR) Conference (2017, 2018, 2020, 2021, 2022)
- Institute of Internal Auditors (IIA) Toronto Chapter Symposium (2021)
- Master of Management & Professional Accounting: Sustainability: A Call to Action (2021)
- The University of Waterloo Centre for Information Integrity and Information Systems (2023)
- Canadian Conference on IT Audit, Governance and Security (CCITAGS) (2019)
- Lazaridis School of Business & Economics Behavioural Accounting Symposium (2018)
- Accounting Association New Faculty Consortium (2013)
- Atlanta Southeast Summer Accounting Research Conference (SESARC) (2012)
- The International Foundation for Research in Experimental Economics (IFREE) workshop (invited participant: 2012)

Teaching

Undergraduate Program

Semester and year	Course	Number of students	Response Rate	Teaching evaluation (out of 5.0)
Spring 2025	AFM 452/ACC 690 Internal Audit	17	35%	4.4
Spring 2025	AFM 451: Audit Strategy Section I	53	34%	3.6
Spring 2025	AFM 451: Audit Strategy Section II	52	35%	4.1
Spring 2025	AFM 451: Audit Strategy Section III	12	24%	3.6
Fall 2024	AFM 451: Audit Strategy Section I	42	43%	4.2
Fall 2024	AFM 451: Audit Strategy Section II	45	24%	4.1
Fall 2023	AFM 452 Internal Audit	12	59%	4.8
Fall 2023	AFM 451: Audit Strategy Section I	58	36%	3.6
Fall 2023	AFM 451: Audit Strategy Section II	36	31%	3.5
Fall 2022	AFM 415 Internal Audit	3	100%	5.0
Fall 2022	AFM 451: Audit Strategy Section I	44	57%	4.4
Fall 2022	AFM 451: Audit Strategy Section II	38	53%	4.4
Spring 2020	AFM 351: Audit Strategy All Sections (see note)	135	45%	4.6
Spring 2019	AFM 351: Audit Strategy Section I	54	65%	4.7
Spring 2019	AFM 351: Audit Strategy Section II	54	63%	4.3
Spring 2019	AFM 351: Audit Strategy Section III	52	58%	4.5
Spring 2018	AFM 351: Audit Strategy Section I	70	76%	4.1
Spring 2018	AFM 351: Audit Strategy Section II	71	48%	3.9
Spring 2018	AFM 351: Audit Strategy Section III	70	57%	4.3
Fall 2016	Accounting II: Managerial Section I (GA Tech)	65	86%	4.8
Fall 2016	Accounting II: Managerial Section II (GA Tech)	63	84%	4.8
Fall 2016	Accounting II: Managerial Section III (GA Tech)	46	93%	4.8
Spring 2016	Accounting II: Managerial Section I (GA Tech)	68	74%	4.7
Spring 2016	Accounting II: Managerial Section II (GA Tech)	71	82%	4.8
Spring 2016	Accounting II: Managerial Section III (GA Tech)	37	89%	4.7
Fall 2014	Accounting II: Managerial Section I (GA Tech)	70	81%	4.8
Fall 2014	Accounting II: Managerial Section II (GA Tech)	53	75%	4.7
Fall 2014	Accounting II: Managerial Section III (GA Tech)	64	70%	4.7
Fall 2013	Accounting II: Managerial Section I (GA Tech)	18	22%	4.8
Fall 2013	Accounting II: Managerial Section II (GA Tech)	66	44%	4.4
Fall 2013	Accounting II: Managerial Section III (GA Tech)	74	45%	4.4
Fall 2012	Accounting II: Managerial Section I (GA Tech)	70	47%	4.0
Fall 2012	Accounting II: Managerial Section II (GA Tech)	37	16%	4.0
Fall 2010	Accounting Principles (UW-Madison)	43	NA	4.5
Summer 2010	Accounting Principles (UW-Madison)	37	NA	4.9
Spring 2009	Accounting Principles (UW-Madison)	47	NA	4.7
Fall 2008	Accounting Principles (UW-Madison)	50	NA	4.5
Fall 2007	Accounting Principles (UW-Madison)	36	NA	4.5

Note 1: Spring 2020 was reformatted to be co-taught online with another instructor during COVID-19. Students were provided the option to rate either or both instructors for all sections. Response rate is adjusted for students identified as either rating me and/or both instructors. Overall response could range from 38% to 65% dependent on assumptions. However, overall instructor rating only ranges from 4.5 to 4.6 regardless of assumptions.

Note 2: Format changed in 2022&2023. Teaching evaluation rating is the average across question references 274 - 279, and not a specific instructor rating as in prior years. Thus, this value is more course specific and less instructor specific. Starting in 2024, the value reported is the SCP Overall score.

Graduate Supervision

School of Accounting and Finance

Dissertation Committee Member, Internal, for Kate Patterson: received Ph.D. in 2023.

Placement: Institute for Strategy and Managerial Accounting, WU Vienna

Dissertation Committee Member, Internal, for Dorian Lane: received Ph.D. in 2021.

Placement: Lecturer, Lazaridis School of Business & Economics, Wilfrid Laurier University

School of Environment, Enterprise and Development (SEED)

Dissertation Committee Member, Internal External, for Jillene Diamond: anticipated 2026.

Placement: TBD

Dissertation Committee Member, Internal External, for Tia Driver: anticipated 2026.

Placement: TBD

Dissertation Committee Member, Internal External, for Michael Zonta: anticipated 2026.

Placement: TBD

Dissertation Committee Member, Internal External, for Adwoa Appiah: received Ph.D. in 2025.

Placement: TBD

Dissertation Committee Member, Internal External, for Vasundhara Saravade: received Ph.D. in 2024.

Placement: Postdoctoral Fellowship, Institute for the Environment & Smart Prosperity Institute (SPI), University of Ottawa (Ottawa, Canada)

Dissertation Committee Member, Internal External, for Amr ElAlfy: received Ph.D. in 2020.

Placement: postdoctoral position, School of Environment, Enterprise and Development

Georgia Institute of Technology

Dissertation Committee Member for Melissa Carlisle: received Ph.D. in 2015.

Placement: Assistant Professor, Case Western Reserve University.

Dissertation Committee Member for Lori Bhaskar (Shefchik): received Ph.D. in 2014.

Placement: Assistant Professor, Indiana University.

Dissertation Committee Member for Yuebing (Sarah) Liu: received Ph.D. in 2014.

Placement: Visiting faculty, Florida International University.

Other

- External reviewer – tenure and promotion (2026)
- MAcc Independent Research Paper Course co-instructor for Gan Kok Shing (2023), and Matthew Tam (2024)
- University of Waterloo, Approved Doctoral Dissertation Supervisors (ADDS) status; 2019
- Co-RA Supervision of Ala Mokhtar through SSHRC grant; four terms over 2019 – 2021

Service

Department

- Director, The Hub for Sustainability Integration
 - 2025 – ongoing
- Value Suite Course Build – Team member
 - 2025 – ongoing
- NRCan Steering Committee
 - 2024 – ongoing
- BSFM Board Member
 - 2024 – ongoing
- School of Accounting and Finance – WatSpeed Initiatives
 - 2024 – 2025
- School of Accounting and Finance Program Committee
 - 2023 – ongoing
- School of Accounting and Finance Strategic Sustainability Initiatives Team (Chair)
 - 2022 – ongoing
- Deputy director, The University of Waterloo Centre for Information Integrity and Information Systems Assurance (UWCISA)
 - 2022 – ongoing
- Research Associate, CPA Ontario Centre for Sustainability Reporting and Performance Management
 - 2022 – 2025
- School of Accounting and Finance Strategy Retreat
 - 2022
- School of Accounting and Finance (SAF) Teaching Allocation Committee member
 - 2020 – 2024
- AFM 470: Financial Management of High Growth Companies Mentor
 - 2018 – ongoing
- School of Accounting and Finance (SAF) Behavioural Research Lab Leader
 - 2017 – 2023
- University of Waterloo School of Accounting and Finance (SAF) Brand Steering Committee member
 - 2018 – 2019

University

- University of Waterloo Ph.D. Chair Pool
 - 2023 – ongoing

Professional – Academic

Editorial Board – Journals

- Accounting Perspectives
- Auditing: A Journal of Practice and Theory

Reviewer – Journals

- Accounting Forum
- Accounting Horizons
- Accounting, Organizations and Society
- Accounting Perspectives
 - Reviewer and Associate Editor
- Applied Economics Letters
- Auditing: A Journal of Practice and Theory
- Behavioral Research in Accounting
- Contemporary Accounting Research
- European Accounting Review
- International Journal of Accounting Information Systems
- International Journal of Auditing
- International Review of Economics and Finance
- Journal of Accounting Research
- Journal of Banking and Finance
- Journal of Business Ethics
- Journal of Economics Behavior & Organization
- Journal of International Financial Management & Accounting
- Managerial Auditing Journal
- The Accounting Review

Reviewer – Conferences

- American Accounting Association Annual Meeting – Auditing Section
- American Accounting Association – Auditing Section Midyear Meeting
- American Accounting Association – Accounting, Behavior, and Organizations Midyear Meeting
- American Accounting Association – Financial Accounting and Reporting Midyear Meeting
- American Accounting Association – Management Accounting Section Midyear Meeting
- American Accounting Association – Sustainability, ESG and Accounting Implications for the Academy and the Profession Conference
- Contemporary Accounting Research
- Centre for Accounting Ethics Symposium
- Canadian Academic Accounting Association Annual Conference
- EAA Annual Congress of the European Accounting Association

Other

- Social Sciences and Humanities Research Council (SSHRC) Insight Grant application assessor (2020)
- 2019 Southern Ontario Behavioural Decision Research (SOBDR) Conference - planning committee (2018 – 2019)
- Canadian Academic Accounting Association Research Grant Reviewer (2023, 2026)

Professional

- Institute of Internal Auditors (IIA) & ISACA Liaison
 - 2017 – ongoing
- Award recipient: Advocacy of the Profession, *The Institute of Internal Auditors (IIA) Toronto Chapter award* (2022, inaugural year)
- Institute of Internal Auditors (IIA) International Leadership Meeting (2025)
- City of Waterloo – Audit Committee Chair
 - Appointed June 2023
- Alexandra Yacht Club – Treasurer
 - Elected November 2024

Grants / Funding

Total external funding while at Waterloo (approximately): \$330,000

Total internal funding while at Waterloo (approximately): \$59,500

Funding received prior to Waterloo (approximately): \$45,000 (in CAD)

- Sustainable Waterloo Region ('SWR') DRAP NRCan project \$200,000; 2026. Hub partnered project with Sustainable Waterloo Region. Application team for SAF
- SAF Special Research Grant \$15,400; 2025. "Untitled extension of ESG projects." (With Angie Fairchild, Indiana University, Joseph Johnnson, University of South Carolina, Jochen Theis, University of Southern Denmark, and Donnie Young, Indiana University)
- Seed Grant by the Interdisciplinary Centre on Climate Change \$10,000; 2020. "Status Quo of Corporate Climate-related Reporting in Canada." (With Olaf Weber and Seda Oz, University of Waterloo)
- CPA Canada Grant \$30,000; 2020. "Enhancing CPA Competencies for Internal Audit Roles." (With Efrim Boritz and Laura Simeoni, University of Waterloo)
- SSHRC Insight Grant \$94,829; 2019. "An Investigation into the Impact of Changing the Auditor's Report on Financial Statement Users." (With Brad Pomeroy, University of Waterloo, and Donnie Young, Indiana University)
- CPA Ontario Centre for Performance Management Research and Education's Grant \$7,000; 2019. "Social and Economic Bonding in an Audit Setting." (With Bryan Church, deceased, Krista Fiolleau, University of Waterloo, and Dorian Lane, Wilfrid Laurier University)
- CPA Ontario Centre for Performance Management Research and Education's Grant \$7,000; 2019. Untitled Extension of: "A Dollar for a Tree or a Tree for a Dollar? The Behavioral Effects of Measurement Basis on CSR Investment Decision." (With Jordan Bable, Indiana University, Jason Kuang, Georgia Institute of Technology, and Jonathan Kugel, Christopher Newport University)
- UW/SSHRC Seed Grant \$7,000; 2018. "An Investigation into the Impact of Changing the Auditor's Report on Financial Statement Users." (With Brad Pomeroy, University of Waterloo, and Donnie Young, Indiana University)
- SAF Experimental Research Grant \$5,000; 2018. "Mandatory Disclosure of Engagement Partner Identity: Insights from Practice." (With Veena Brown, University of Wisconsin – Milwaukee, and Jodi Gissel, University of Wisconsin – Whitewater)
- SAF Experimental Research Grant \$5,000; 2018. "Social and Economic Bonding in an Audit Setting." (With Bryan Church, deceased, Krista Fiolleau, University of Waterloo, and Dorian Lane, Wilfrid Laurier University)

- SAF Experimental Research Grant \$5,000; 2018. “Are ‘Good’ Auditors Impacted More by Depletion? Threats to Valued Auditor Attributes.” (With Lori Bhaskar, Indiana University, and Tracie Majors, University of Southern California)
- CPA Ontario Centre for Performance Management Research and Education’s grant \$3,900; 2017. “A Dollar for a Tree or a Tree for a Dollar? The Behavioral Effects of Measurement Basis on CSR Investment Decision.” (With Bryan Church, deceased, Jason Kuang, Georgia Institute of Technology, and Jiang Wei, Jinan University)
- Center for International Business Education & Research (CIBER) Research Grant, Georgia Tech \$2,600 USD; 2016. “The Influence of Firms’ Emissions Management Strategy Disclosures on Investors’ Valuation Judgments.” (With Joseph Johnson, University of South Carolina, Jochen Theis, University of Southern Denmark, and Donnie Young, Indiana University)
- Center for International Business Education & Research (CIBER) Research Grant, Georgia Tech \$2,600 USD; 2015. Grant to support summer exchange to Mercator School of Management (Universität Duisburg-Essen)
- Euro Visiting Scholar Travel Support, Mercator School of Management (Universität Duisburg-Essen) 4,000 Euro; 2015. Grant to support summer exchange.
- PriceWaterhouseCoopers Grant \$25,000 USD; 2009. “Myopic Loss Aversion and Market Experience.” (With Brian Mayhew, University of Wisconsin – Madison)

Other Scholarly Accomplishments

- 2024 University of Waterloo Outstanding Performance Award
- CPAO Centre for Sustainability Reporting and Performance commissioned article, “Balancing Incentives and Sustainability: A Managerial Perspective” (November 2024)
- Robert Harding Research Leadership Fellow (July 1, 2023 to June 30, 2026)
- Visiting Scholar, Mercator School of Management (Universität Duisburg-Essen), July 2015

Other Professional Activities

- Obtained Certified Internal Auditor designation in December 2021. Active certificate
- Lead project to provide input into future internal audit skills for CPA Canada Competency Map Taskforce, 2020 – 2021
- Expert witness retained by DeWitt Ross & Stevens S.C., Madison, Wisconsin, 2011 – 2012
- Consulting, DeWitt Ross & Stevens S.C., Madison, Wisconsin, 2010