

**School of Accounting & Finance  
University of Waterloo  
Waterloo, Ontario, Canada  
N2L 3G1**

Julie Elizabeth Robson, CPA, CA  
CPA (Illinois)  
Associate Professor – Teaching Stream, 2024  
Continuing Lecturer Taxation, 2006 to 2023  
Definite Term Lecturer Taxation, 2001 to 2005

**DEGREES**

Masters of Accounting, University of Waterloo, 1992  
Bachelor of Arts, University of Waterloo, 1991

**ACADEMIC HONOURS**

Graduated on Dean's Honour Role, 1992

**PROFESSIONAL DESIGNATION**

Certified Public Accountant, American Institute of Certified Public Accountants, 1998  
Chartered Professional Accountant, Chartered Accountant, Chartered Professional Accountants of Canada, 1993

**EMPLOYMENT HISTORY**

Senior Manager Taxation, PricewaterhouseCoopers LLP, 1994 to 2000  
Tutorial Leader, In Depth Tax Course, Canadian Institute of Chartered Accountants, 1997 to 2000  
Senior Associate, Audit, KPMG LLP, 1990 to 1994

**PUBLICATIONS**

Author;  
Introduction to Federal Income Taxation in Canada, Robert E. Beam, Stanley N. Laiken, James J. Barnett, Nathalie Johnstone, Devan Mescall, Julie E. Robson  
Contributor to;  
Introduction to International Taxation in Canada, Jean-Pierre Vidal

**TEACHING EXPERIENCE**

ACC 607 Tax Issues Integration, Master of Accounting Program, 2005-2024  
ACC 605 International Tax in a Canadian Context, Master of Accounting Program, 2002-2013

ACC 361 Taxation 1, Accounting and Financial Management Program, 2001-2006  
ACC 461 Taxation 2, Accounting and Financial Management Program, 2007-2012  
ACC 462 Taxation 3, Accounting and Financial Management Program 2013-2024

## **CASE DEVELOPMENT ACTIVITIES**

### **2024**

#### **ACC 607/ AFM 462**

Integrative multi-discipline case (financial reporting IFRS, corporate and personal taxation, performance measurement (AFM 482 collaboration), data analytics analysis)

#### **AFM 462**

Integrative tax case (corporate taxation, personal taxation, salary/dividend decision making)

### **2023**

#### **ACC 607**

Integrative multi-discipline case (financial reporting ASPE, corporate tax, HST, personal)

#### **AFM 462**

Integrative tax case (corporate taxation, personal taxation, salary/dividend decision making)

Integrative tax case (business asset sale vs share sale, wind up decision making, shareholder loans, attribution)

Integrative tax case (financial reporting for income taxes ASPE, share redemptions, deceased taxpayers, trust tax profile, shareholder benefits)

### **2022**

#### **AFM 462**

Integrative tax case (employment, incorporation, financial planning, HST)

Integrative tax case (share sale, attribution, acquisition of control, financial planning)

Integrative tax case (wind up of corporation, death of taxpayer, estate)

#### **ACC 607**

Integrative multi-discipline case (personal tax & decision making, finance NPV analysis)

### **2021**

#### **AFM 462**

Integrative multi topic tax case (business acquisition, compensation issues/planning, HST)

Integrative multi topic tax case (share vs asset sale, finance NPB analysis)

Integrative multi topic tax case (death of taxpayer, wind up of corporation, estate)

#### **ACC 607**

Integrative multi-discipline case (personal tax issues, residency, valuation, financial reporting, HST)

## SERVICE ACTIVITIES

CAAA Education Committee (2024)

CPA Canada's Tax Education Tax Force (2023-2024)

Honorary Member of the University Nomination Committee (2023-2024)

Definite Term Lecturer Screening Committee Lead (2022, 2023)

Waterloo Centre for Taxation in Global Economy (2016 – 2024)

Tax Educator Conference

Panelist (2023),

Teaching Tax in a Changing World - Panelist/Facilitator (2022),

The Changing Landscape of Tax Education in Canada - Panelist/Facilitator (2021)

Tax Educator Group member (2021 – 2024)

Young Tax Professionals Student Group Lead (2014 – 2024)

- Student case competition (2024 Capital Gains Taxation, 2023 AMT Legislation, 2022 EIFEL Legislation, 2021 Personal financial planning and tax case, 2020 Tax case creation) (alumni panel)
- Speaker sessions (alumni relations)
- Mentorship program (2023, 2024 25 alumni mentors/groups)

Performance Evaluation Redesign Team member (2023, 2024)

Compensation Redesign Team (advisor) (2023)

Tax, Assurance, Analytics Committee member (2023, 2024)

MAcc Base Camp Team (2021 – 2024)

Teaching Practices Committee on Blended Learning member (2022, 2021)

Teaching Allocation Committee (2021-2024)

Fellowship Program team (2020, 2021)

MAcc Scholarship Committee member (2020-2024)

Jim Barnett Tax Experiential Award (2022-2024)

Associate Director University of Waterloo Master of Accounting Program, 2013 to 2019

Associate Director University of Waterloo Master of Taxation Program, 2002 to 2012