

Carl J. Allocca
Certified Public Accountant

| Harriman Hall, Room 305 | (631) 806-1279 | carl.allocca@stonybrook.edu |

Professional Experience:

Stony Brook University, College of Business (September 1992 to Present)

Accounting Senior Lecturer	September 2020 – Present
Accounting Lecturer	September 1996 – August 2020
Accounting Program Coordinator	September 2015 – August 2019
Director of Undergraduate Business Program	September 1996 – August 2015
Adjunct Accounting Instructor	September 1992 – August 1996

College of Business Administrative Responsibilities:

Accounting Program Coordinator:

- Solely responsible for the preparation of the program proposal for the creation and development of the MBA in Accounting for the College of Business. This program was approved by the New York State Education Department as CPA licensure qualified.
- Involved with the preparation of the program proposal for the MS in Accounting for the College of Business. This program has been reviewed and approved by the New York State Education Department as CPA licensure qualified.
- Involved with the preparation of the program proposal for the BS in Accounting for the College of Business. This program is being reviewed for approval by the New York State Education Department as CPA licensure qualified.
- Evaluation of academic transcripts and transfer courses relating to the undergraduate accounting minor, MBA and MS accounting program requirements.
- Accounting Course Coordinator- Responsible for the administration of ACC 210 - Financial Accounting. Review of the course topical coverage, grading components, projects etc. for consistency between Stony Brook University and SUNY Korea. Periodic meetings are conducted to monitor, coordinate and review all aspects of course delivery and assessment for AACSB accreditation.
- Assurance of Learning Course Coordinator for Financial Accounting - Responsible for the review of the AOL process including ensuring that data are collected, assisting faculty when

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needed with data analysis and evaluation. Report to the Assurance of Learning Undergraduate committee to use these results to inform them of ACC 210 - Financial Accounting revisions and to impact program changes, learning objectives, learning goals, and curriculum mapping when necessary and appropriate.

- College of Business Scholarship Committee - Responsible for the review and assessment of student scholarship essays, resumes, and academic transcripts to determine recommendations for the College of Business scholarships to be awarded.

Director of Undergraduate Business Program:

- Involved with the revision of the business major, accounting minor and business minor requirements, admission policy, graduation criteria and elective course offerings of the undergraduate business program.
- Coordination and development of academic course schedules and bulletin revisions.
- Involved with the coordination, curriculum development, course revisions, student advisement etc. for the accounting minor, and the graduate MBA and MS programs in accounting.
- Preparation of courses and development of the curriculum design for the undergraduate accounting minor and the accounting specialization.
- Responsible for interviewing and hiring adjunct faculty.
- Interviewed and assessed students for admission to the Fast Track (Combined Degree) MBA program.

Teaching Interests and Course Development:

Graduate Courses Taught:

- Financial Accounting
- Managerial Accounting and Decision Making
- Accounting Capstone

Undergraduate Courses Taught:

- Financial Accounting

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- Managerial Cost Analysis and Applications
- Intermediate Accounting I

Course Development

- ACC 210 - Financial Accounting as an outline course with audio lectures, homework assignments, and semester project and course exams.
- ACC 214 - Managerial Cost Analysis and Applications as an online course with audio lectures, homework assignments, and semester project and course exams.
- ACC 310 - Intermediate Accounting I as an online course with audio lectures, homework assignments, and semester project and course exams.
- Development of the auditing section of the graduate accounting capstone course for the MS program. Preparing students for the CPA exam in auditing based on objective questions and task-based simulations covering a variety of conceptual and quantitative concepts.
- Development of advanced accounting courses (Intermediate Accounting I & II, Financial Statement Reporting and Analysis, Federal Income Taxation I & II, Accounting for the Small Business Entrepreneur and Auditing) for the undergraduate accounting specialization and the accounting minor.
- Development of the curriculum design and advanced accounting courses (Accounting for the Small Business Entrepreneur, External Auditing, Internal Auditing, Government & Not – For Profit Accounting, Financial Accounting Theory, Advanced Accounting Problems and Forensic Accounting) for the graduate accounting concentration, and the MBA and MS in accounting.
- Preparation of integrated computerized accounting projects using Peachtree and QuickBooks accounting software in conjunction with the Fast Track (Combined Degree) MBA Summer Program.
- Developed and delivered an asynchronous online graduate financial accounting course using Blackboard as the learning management system. This is a core course for the students in the MBA program.
- Faculty advisor for graduate and undergraduate student internships.
- Development and delivery of the financial accounting course for executives for the onsite MBA program at BAE Systems Inc.
- Participated as thesis advisor and mentor for the senior Business Honors Program students in the accounting specialization.
- Responsible for the supervision and work distribution of undergraduate and graduate teaching assistants who provide administrative support for the courses the I teach.

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Honors and Awards:

- Most Valuable Professor – 2019 ○ Nominated by Men’s Lacrosse Team
- Faculty and Staff Appreciation Certificate – 2018 ○ Nominated by Women’s Soccer Team
- Most Valuable Professor- 2017 ○ Nominated by Women’s Soccer Team
- Provost’s Outstanding Lecturer Award – 2014
- Award of Honor- Outstanding Undergraduate Instructor Business Management ○ Years Won:
 - 1997 – 2001
 - 2010
 - 2012
 - 2014
- Award of Honor- Excellence in Teaching- Business Management ○ Years Won:
 - 1997 – 1999
- Award of Honor- Outstanding Graduate Instructor Technology Management Program – 1999

College of Business and Other Service Activities:

- Member of focus group for Cambridge Business Publishers for Managerial Accounting for Undergraduates, 3rd edition by Christiansen. Textbook review and completion of post review survey relating to a critique of content, and ancillary resource material and pedagogical approach of the text
- Member of the High School and Community College Outreach Task Force – Currently collaborating with university personnel to conduct visits to community colleges, and high schools as part of the Accelerated College Education (ACE) Program to increase Stony Brook University and the College of Business visibility and enrollment.

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- Guest Speaker, Accelerated College Education (ACE) Program – Visited various high schools presenting the accounting curriculum, various career paths, and the current trends and developments in the accounting profession.
- Member of the Accounting Search Committee - Involved with the recruitment, evaluation, and selection of potential accounting faculty. Participated in resume screening, candidate ranking, the interview process and hiring recommendations.
- Faculty advisor for the Accounting Association – Provide guidance, input and collaboration events related to professional development events.
- Textbook Reviewer- McGraw- Hill Education, for Fundamentals of Financial Accounting 8th edition by Phillips, Libby and Libby. The review involved a detailed textbook analysis and critique relating to content, organization and ancillary resource material, and the pedagogical approach of the text.
- Textbook Reviewer- McGraw- Hill Education, for Fundamentals of Financial Accounting for Business 2nd edition by Thomas Edmonds, and Philip Olds. The review involved a detailed textbook analysis and critique relating to content, organization, ancillary resource material, and the pedagogical approach of the text.
- Textbook Reviewer- Wiley Publishing, for Cost Accounting by Karen Farmer and Amy Fredin, a new book currently in development. The review involved a detailed textbook analysis and critique relating to content, organization, ancillary resource material and the pedagogical approach of the text.
- Member of the Wiley Publishing Co. Advisory Panel- Collaborate with business professionals, instructors, students and publishing managers. The contributions made to the board will impact the company's products and services. I provide them with feedback throughout the year.
- Committee member of Cengage Exchange Institutional Research Panel - Collaborate with instructors, students and publishing managers. The contributions made will impact the company's products and services. I provide feedback throughout the year regarding how higher education and institutional needs are changing over time and can be improved.
- Member of the AACSB Assurance of Learning Committee - Review of the student learning goals and objectives and various assessment methods. Update of the curriculum mapping for the undergraduate program.
- Accounting Curriculum Committee member - Involved with the creation and development of the Bachelor of Science degree in accounting, and modifications to the Master of Science degree in accounting.

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- Visit a Class Program- Potential Stony Brook students observed my accounting classes as part of the University outreach program.
- Accounting Course Reviewer- Review of student transcripts and individual student advisement regarding compliance with the education requirements for the Certified Public Accountancy exam.
- MBA Fast Track Interviews- Interviewed and evaluated students for admission to the Fast-Track MBA program.
- Accounting Annual Networking Event- Networked with the accounting firms and students regarding potential internship and full-time employment opportunities.
- Functioned as a liaison between employers and students to facilitate internship opportunities in accounting.
- Resume reviews for accounting students. Advised students regarding internship opportunities, resume preparation, course requirements and program completion.
- Faculty sponsor for business internships.
- Chair of the Undergraduate Business Admissions Committee- Involved with the development of admission criteria, transfer course equivalency assessments, retention criteria and revision of admission deadlines where appropriate. Responsible for the review of student's transcripts, transfer course evaluations and decisions relating to the admission of students to the business program and the ongoing administrative support and control of the program.
- Chair of the College of Business Undergraduate Curriculum Committee which created and implemented revisions to the Undergraduate Business Major Curriculum, and established specializations in Accounting, Finance, Marketing, Management and Operations effective fall 2005.
- Chair of the AACSB Assurance of Learning task force committee for business knowledge for the graduate program.
- Minors Committee - Responsible for the development of interdepartmental minor programs within the College of Engineering and Applied Sciences (includes Applied Math and Statistics, Computer Science, Electrical Engineering, Materials Science and Engineering, Mechanical Engineering).
- NCAA Subcommittee on Fiscal Integrity - Responsible for the review of university operating procedures and reporting practices regarding NCAA compliance, and recommendations for improvements to the current university policies and procedures.

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- Honors Business Program Committee- Responsible for the coordination and completion of course sequencing charts, course approval forms and preparation of summary revisions for submission to the Curriculum Teaching and Policy Committee.
- Member of the SUNY Managerial Accounting Working Group. Participated in the development of a proposal that addressed the revisions of course content areas, course description and course syllabi.
- Member of the Program Management Team Committee, which dealt with various curriculum, administrative, policy and procedure issues relation to the undergraduate and graduate business programs.
- Member of the College of Business Curriculum Review Committee which deals with various curriculum and administrative issues.
- Departmental representative for 7 years on the Curriculum Teaching and Policy Committee.
- Participated in various search committees for faculty and staff positions.
- Coordination of, and participation at “The Major Event” which assists business and nonbusiness students with academic advisement.
- Freshman and transfer student orientation presentations and academic advising sessions.
- Admitted Students Event - Faculty representative. Met with students and their families to discuss the College of Business program options, curriculum design, career paths etc.

Solo Practitioner, Certified Public Accountant (July 1992 to Present)

- Client services performed include compilation & review engagements, management advisory services, and personal and business tax return preparation. Internal Revenue Service client representation.
- Maintain continuing professional education credits through seminars, workshops, and independent study courses on an annual basis.

Adjunct Assistant Professor (September 1992 to August 2009)

- Suffolk Community College ○ New York Institute of Technology ○ Long Island University ○ Dowling College ○ Briarcliffe College

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- Primarily responsible for the presentation, instruction, monitoring and the overall administration of the following courses in the undergraduate and graduate academic programs:
 - Principles of Accounting I & II ○ Financial Accounting ○ Managerial Accounting ○ Intermediate Accounting ○ Governmental and Not-for-Profit Accounting
- Development and presentation of asynchronous distance learning course in Principles of Accounting II for the SUNY Learning Network and Desire 2 Learn platforms.
- Member of the Accounting and Business Advisory Board at Suffolk Community College

McMahon, Martine & Merritt, Treasurer (January 1989 – July 1992)

- Primarily responsible for the financial and administrative operation of a medium sized multioffice law firm.
- Integrally involved with a fully integrated computer conversion of a manual accounting/time and billing system, including continual modifications and enhancements.
- Supervised and monitored the daily accounting department operations.
- Preparation and review of monthly financial statements, annual and interim financial budgets and monthly partners' reports.
- Preparation and review of individual, corporate, partnership, estate, income tax, sales/use, payroll, N.Y.C. Unincorporated Business and Commercial Rent tax returns.

Stimpson Company, Controller (June 1983 – December 1988)

- Responsible for the supervision and coordination of the daily operating performance of the accounting department consisting of 35 people.
- Automated conversion of manual accounting systems via personal business computers
- Preparation of financial statements, budget forecasts, feasibility studies and internal audit reports

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- Annual cost accounting study - evaluating departmental profitability, overhead rates, and inventory pricing structure
- Establishing company accounting policies, internal controls, and business operating procedures
- Coordination and planning of the interim and year end annual independent audit
- Review of payroll, sales/use, pension plan, excise and personal property tax returns
- Interim and year-end inventory observation and valuation
- Formulation of record retention, sales tax and employee business expense review programs

Ernst & Young, Senior Accountant (December 1978 – June 1983)

- Planned, organized and supervised audit engagements
- Prepared annual reports (Form 10K) and quarterly financial statements (Form 10Q) in accordance with the rules and regulations as set forth by the Securities and Exchange Commission
- Documentation (system flow charts, narratives, accounting manuals and management letters) and evaluation of accounting systems, controls, and business operations
- Review and evaluation of audit work papers, and involvement in staffing engagements
- Formulation and implementation of client accounting policies and internal controls
- Functioned in the capacity of “on-campus”/office college recruiter. Participated in college career advisement in the form of speeches, panel discussions and oral and visual presentations

Professional License: *New York State Certified Public Accountant*

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Education :

William Howard Taft University

- Masters of Science, Taxation

Magna cum laude

Long Island University – C.W. Post, School of Professional Accountancy

- Bachelor of Science, Accounting
- Magna cum laude

Professional Membership:

New York State Society of Certified Public Accountants