



2024 Annual Highlights

SDSU

Fowler College of Business
Charles W. Lamden
School of Accountancy

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Message from the Director



Dear Friends of the Charles W. Lamden School of Accountancy,

It is my pleasure to share with you the accomplishments and advancements of the Charles W. Lamden School of Accountancy over the past year. As we continue to pursue excellence in accounting education and scholarship, I am proud of our faculty, students, and alumni who contribute to the legacy of our school.

This year, we have placed a strong emphasis on developing well-rounded accounting professionals equipped with the technical and leadership skills needed to thrive in an ever-evolving profession. Our soft skills luncheons, made possible by the generosity of our alumni and donors, provide students with invaluable opportunities to enhance communication, collaboration, and leadership abilities — qualities highly sought after by today's employers.

We have also expanded our community college outreach initiatives to support the success of transfer students. These efforts reflect our commitment to creating pathways for diverse students to thrive in our programs and beyond, ensuring a smooth transition and equipping them with the tools to achieve their career aspirations.

In academic research, our faculty have continued to excel, with publications in leading accounting journals that advance knowledge in the field and shape practice. These contributions reinforce our position as a hub for thought leadership in accounting education and research.

Additionally, we are integrating artificial intelligence and emerging technologies into our accounting curriculum to prepare students for the future of the profession. From data analytics to AI-driven decision-making, our courses are designed to ensure that graduates remain at the forefront of industry innovation. These efforts support the rigorous standards of our separate AACSB accreditation, which highlights our commitment to excellence and continuous improvement.

I extend my heartfelt gratitude to our alumni, donors, faculty, staff, students, and industry partners for your unwavering support. Together, we are shaping the future of accounting and strengthening the reputation of the Charles W. Lamden School of Accountancy as a leader in the field.

Thank you for your continued engagement and dedication to our mission. I look forward to another year of accomplishments and innovation.

Warm regards,

Jeff J. Wang
William E. Cole Director
Charles W. Lamden School of Accountancy



Anri Inoue

BMACC Student is Awarded CalCPA Scholarship

SDSU BMACC student, Anri Inoue, was awarded \$4,000 through the California Society of CPAs (CalCPA) San Diego Scholarship program during the spring of 2024. Inoue was nominated for the scholarship by accounting professor Yan Luo and finance professor, Yaoyi Xi after she served as a graduate assistant for both.

Inoue, a native of Japan, will complete her 5-year BMACC program in the spring of 2025. She worked as an external audit intern for the Japan Business Network in the Los Angeles office of PwC during the summer of 2024.



Accounting Lecturer Honored with a 2023 Glazer Fellowship Endowment

Accounting lecturer Narelle MacKenzie was recognized during the fall of 2023 with a Glazer Outstanding Lecturer Fellowship Endowment for her outstanding teaching and service to San Diego State University and the Fowler College of Business.

The Glazer Outstanding Lecturer Fellowship Endowment was established by SDSU alumnus, Jeffrey Glazer ('81, MBA) who lectured at the Fowler College of Business for over 20 years. Each endowment spans a two-year period and all recipients receive a commemorative award, a salary supplement, and additional funding to support their professional development activities.

MacKenzie, who began her academic career at the Fowler College of Business in 2007, teaches international and business taxation. She currently serves as a faculty representative on SDSU's Student Grievance Committee, and as an alternate member of SDSU's Lecturer Affairs Committee. Additionally, she received a Teaching Excellence Award from the college in 2022, and she was named the most influential faculty member by the top students in Fowler's MSBA Program (2020), Online Degree Completion Program (2021) and the BMACC Program (2022).



Jeff Glazer (left) and Narelle MacKenzie (SDSU/ Suzanne Finch)

ERPSim International Competition

A team of students in Leon Chan's Cost Management course (ACCTG 432) finished among the top third of all participants in the ERPSim International Competition, finishing 5th in a field of 15 teams. The SDSU student team was the only one from the U.S. to secure a spot as a top five finalist.

Students Jacob Sullivan, Katie Nguyen, Samuel Chan and Joseph Dowdy earned a spot for Team SDSU in the international finals by winning the North American Competition three months prior.

New Faculty



Dennis Ahn

Dennis Ahn

A recent graduate of the University of California, Irvine, Dennis Ahn began his academic career at the Fowler College of Business as an assistant professor in the Charles W. Lamden School of Accountancy this fall. Ahn holds a certified public accountant (CPA) license in California and has several years of experience as an accounting practitioner, including as an associate at BlackRock and as an external auditor at Grant Thornton in Los Angeles. He is currently teaching two sections of Managerial Accounting Fundamentals (ACCTG 202) this fall.

Ahn's research focuses on financial accounting and reporting, mergers and acquisitions, audit quality, and human capital.



Charles Lee

Charles Lee

Charles Lee joined the Fowler College of Business this fall as an assistant professor of accounting where he is teaching Federal Income Taxation (ACCTG 332) during the fall semester. Prior to entering academia, he worked as a credit risk analyst.

Lee's research interests include corporate tax planning and the consequences of tax and economic policy changes. He earned his bachelor's degree at the University of Notre Dame, and his Ph.D. at the University of California, Irvine.

SDSU Accounting Students Are Awarded Prestigious Scholarships for Classroom Ethics and Academic Excellence

Two first-generation students in the Charles. W. Lamden School of Accountancy within SDSU's Fowler College of Business have each been awarded \$15,000 scholarships from the Public Company Accounting Oversight Board (PCAOB) based on their outstanding academic achievements and their demonstration of high ethical standards.



Jahaziel Sanchez

Jahaziel Sanchez, a BMACC 4+1 student and Meng Wang a student in the master of science in accountancy program (MSA), were nominated for the scholarships by Lin Wang (Sanchez) and Yan Luo and Valerie Li (Wang).

The PCAOB scholarships are awarded to students are likely to become financial and accounting auditors and who are attending U.S. colleges and institutions that are accredited by the Association to Advance Collegiate Schools of Business (AACSB). Over half of the recipients of PCAOB scholarship recipients come from backgrounds that are underrepresented in the accounting profession.

"As a Latino student with a passion for accounting, I am deeply thankful to the PCAOB for investing in me and the community I represent," and Sanchez, who is the owner of SD360 Photo and a member in SDSU's Project Rebound Program. "I am honored to have been chosen to be a recipient of the PCAOB scholarship, which eradicates the stress of being able to afford my master's degree."

"I am grateful to the PCAOB for their recognition of my achievements and for their generous award," said Wang, who currently serves as a graduate assistant with the Charles. W. Lamden School of Accountancy. "The funding will give me greater flexibility to study for the CPA exams this spring before I launch my career as a financial auditor."

Both Sanchez and Wang will complete their degree programs at the end of the spring semester in 2025.



Meng Wang





Teaching Students the Soft Skills They'll Need to Succeed



With the intent of polishing students' professionalism and communications skills, the Charles W. Lamden School of Accountancy hosted its second annual Career Readiness Luncheon on March 27, 2024.

The event was led by leadership and communications coach Susan Schultz, who shared tips with students regarding business lunch etiquette, choosing proper interview attire, and background and lighting scenarios for online meetings.

The luncheon was attended by professionals, donors and employers who discussed the attributes they looked for in potential job candidates, as well as some behaviors to avoid when meeting with hiring managers.

"For students to realize career success, it's imperative to help them excel in interpersonal and communications skills before they sit for that first interview," said Jeff Wang, William E. Cole Director of the Charles W. Lamden School of Accountancy. "Employers demand people who can successfully collaborate with others, listen effectively, and demonstrate problem solving abilities every bit as much as having the necessary technical skills. We are committed to empowering students by teaching them the soft skills they'll need to achieve success in all areas of their careers and lives."

Professor Yan Luo Serves as Faculty Advisor to Weber Honors Students

Accounting professor, Yan Luo, an advisor in SDSU's Weber Honors College offered guidance to two students who submitted academic research papers as part of their curriculum requirements.

Students in the Weber Honors College are required to complete a study abroad program and participate in at least one high impact experience (research, leadership, service or performance) prior to completing their undergraduate degree.

The two students, Audrey Jullien (Business) and Juliana Wherrett (Accounting) chose to pursue academic research as one of their experiences and completed their papers in the spring of 2023. Jullien submitted her research on "Examining the Impact of AI Implementation on Auditors' Cognitive Biases" and Wherrett examined the effects of diversity in organizations in her paper "Diversity Drives Success: Unleashing Innovation and Performance in Corporations."

To be part of the Weber Honors College advising team, Luo underwent a rigorous application and interview process. She was selected as a faculty advisor during the fall of 2023 and she became a mentor to Jullien and Wherrett during the spring of 2024.

Jullien is working as a congressional intern in Washington D.C. during the fall of 2024 and Wherrett will embark on study abroad experience during the spring of 2025.



From left: Audrey Jullien, Professor Yan Luo, Juliana Wherrett

Updated Curriculum Integrates AI into Undergraduate Coursework

As organizations increasingly utilize artificial intelligence (AI) in their business operations, the Charles W. Lamden School of Accountancy has enhanced its undergraduate curriculum with additional AI technologies, preparing students to be job-ready on day one.

Accounting professors Jeff Wang, Yan Luo and Valerie Li secured a \$15,000 grant from PwC to augment data analytics capabilities into three key courses: Intermediate Accounting I (ACCTG 331), Accounting Information Systems (ACCTG 333) and Auditing (ACCTG 431). The new AI enhancements will be rolled out to approximately 500 – 600 students in these classes during the 2024 -25 academic year.

The advanced AI capabilities are expected to offer significant advantages to students as they enter the job market. “By providing our students with state-of-the-art AI training, they will be equipped with the skill set to navigate the emerging technology landscape within the public accounting profession to conduct data-driven assessments,” said Wang.



Luke Wilson (left) and Carlos Munevar prepare for class (SDSU/Suzanne Finch)

Beta Alpha Psi

SDSU's Beta Alpha Psi student organization (Beta Eta chapter) attained “Silver Status” this year during the group's annually help national meeting in Orlando, Florida in July. The faculty advisor for the group is Professor Stefan Slavov.



Transfer Student Information Session

Professor Steve Gill shared a presentation titled “Pathways to Excellence: Navigating Success as a Community College Transfer Student” with Mesa College students on November 1, 2023. The session offered information to students interested in transferring to SDSU and the Charles W. Lamden School of Accountancy.



Slavov Wins Best Paper Award

Stefan Slavov and Steven Maex of George Mason University were awarded “Best Research Paper” for their work on “Initial Evidence on Stablecoin Reserve Report Disclosure Practices” at the American Accounting Association’s 2024 Accounting Information System (AIS) and Strategic and Emerging Technologies (SET) Sections Meeting in January 2024.

San Diego Business Journal Recognizes 15 Fowler Alumnae as Women of Influence in Accounting and Finance

The January 22, 2024 edition of the San Diego Business Journal announced their annual selection of the Top 50 Women of Influence in Accounting and Finance. Fifteen of the women honored this year were alumnae of the Fowler College of Business at San Diego State University.



Molly Addington
'96, Accounting
Wells Fargo
SVP, Wealth
Treasury
Management,
Managing Director



Jennifer Barnes
'08, MBA
Optima Office Inc.
CEO



Michelle Bello
'89, Accounting
National University
Sr, VP,
Administration
and Finance



Livia Benjamin
'04, Accounting
'10, MSA
Duffy Kruspodin,
LLP
Partner



Jenilee Cabading
'05, Accounting
Community Housing Works
Controller



Jewell Cornejo
'21, Accounting
RJS Law
Accounting and
Finance Assistant



Kathy Greci
'01, MBA
C3 Risk & Insurance Services
VP of Finance



Daisy Hom
'95, Accounting
Duffy Kruspodin,
LLP
Partner



Anna Howard
'03, Management
'11, MSBA
LPL Financial
SVP and Head
of Private Wealth
Management



Rosemary Linden
'16, MSBA
Momentum CFO
President



Jackie Mazur
'03, Finance
'08, MSBA
Guide My Finances
President



Jackie Padilla
'18, Accounting
Rowling & Associates LLC
Tax Advisor



Sandie Portilla
'08, Management
RJS Law
Financial
Administrator



Elsa Romero
'97, Accounting
Aldrich CPAs + Advisors LLP
Partner



Kris Taylor
'97, Accounting
Latitude 33 Planning & Engineering
CFO Human
Resources

Top Students for 2024

This year's top students for the Charles W. Lamden School of Accountancy are Hannah McGaughey (undergraduate), Joseph Dowdy (BMACC) and Savannah Atkin (Master of Science in Accountancy).



Hannah McGaughey

Hannah McGaughey was selected as the top undergraduate in the Charles W. Lamden School of Accountancy for 2024. As the top student, McGaughey sat on the stage with her most influential faculty member, Pablo Machado during commencement services on May 11.

McGaughey's plans after graduation include studying for the CPA exams and starting her career as an audit assistant for Nigro & Nigro in August 2024.

Fun Fact: "One thing on my bucket list is to hike the Grand Canyon from rim to rim."



Joseph Dowdy

The top BMACC student for 2024 is Joseph Dowdy. Dowdy selected accounting lecturer, John Hayes, as his most influential faculty member because "his passion for his job inspires us students to excel."

Dowdy's post-graduation plans including spending time with family and friends before he starts work at the technology risk management practice at KPMG's San Diego office in the fall. Around the same time, he will also start teaching accounting information systems at Point Loma Nazarene University as an adjunct lecturer.

Fun Fact: He was on a team of SDSU accounting students who won the North American ERPsim competition in March. The team finished fifth in global finals.



Savannah Atkin

This year's top MSA student was Savannah Atkin. Atkin also earned her bachelor's degree in accounting from the Charles W. Lamden School of Accountancy. Atkin's most influential faculty member is James Vogt.

Prior to, and shortly after earning her degree, Atkin plans to study for the CPA exams. She will also begin her new role as an audit associate at Deloitte's San Diego office which in the fall of 2024.

Fun Fact: Atkin's favorite food is sushi.





Yan Luo Receives 2023 Teaching Excellence Award



Dean Dan Moshavi (left) and Yan Luo

Professor Yan Luo was selected to receive a 2023 Teaching Excellence Award from the Fowler College of Business. She was selected for the award for her outstanding skill in the classroom and for consistent dedication to her students.

Luo is no stranger to awards, having earned accolades from numerous organizations at SDSU, including being named “Professor of the Year” by the university’s Beta Gamma Sigma chapter (2018), Fowler’s Outstanding Faculty Contribution award (2018) and Most Influential Faculty by Fowler’s top undergraduate accounting student (2017).

Luo has made a concerted effort to integrate diversity, equity and inclusion (DEI) into her teaching and learning outcomes by giving students data analytics assignments which allow them to visualize the barriers in the accounting industry for women and underserved communities. They are then encouraged to discuss creative solutions to the issue with the objective of making them effective leaders as they enter the workplace.

Additionally, Luo has also acted as a mentor to four students who have successfully applied for the prestigious Public Company Account Oversight Board (PCAOB) scholarships, to numerous students involved in SDSU’s undergraduate research program, and to students in the Weber Honors College Research Program.

Luo received her award on March 22, 2024, when she and the other award recipients offered presentations to other Fowler faculty members outlining their perspective and approach to teaching effectiveness.

Godinez and Roberts Join the Charles W. Lamden School of Accountancy Advisory Board

In 2024, the advisory board welcomed two new members: SDSU alumni, Gerardo Godinez ('01, Accountancy) and Christopher Roberts ('92, Finance).



Christopher Roberts

Christopher M. Roberts, CPA, is a founding shareholder of West Rhode & Roberts, and a 1992 finance graduate of SDSU. Roberts utilizes his extensive experience to advance the firm's audit and tax services through strategic technology implementation and process optimization.

With over 30 years in public accounting, Roberts works closely with WRR's team managers to ensure the firm remains at the cutting edge of evolving standards and technological advancements.

Roberts is dedicated to serving privately held companies and nonprofit organizations, offering specialized expertise across a wide array of not-for-profit sectors. His clients include private foundations, religious organizations, museums, social service agencies, private educational institutions, and performing arts organizations. He also advises privately held companies in industries such as hospitality, healthcare, renewable energy, and manufacturing.



Gerardo Godinez

Gerardo Godinez, a 2001 alumnus of the Charles W. Lamden School of Accountancy, joined the school's advisory board in 2024. He practiced public accounting with Moss Adams LLP since 2002 and is currently the partner in charge of the firm's San Diego location. He is also a member of the firm's Inclusion and Diversity Advisory Board, Corporate Social Responsibility Reporting Working Group and an executive sponsor for the firm's LatinX business resource group. Godinez currently serves on the boards of the LEAD San Diego and Connect San Diego.

Godinez has extensive experience navigating public middle-market and private emerging growth companies through complex transactions involving mergers and acquisitions, equity and debt financing, and customer contracts.

Charles W. Lamden School of Accountancy Board 2023 – 24

Camile Alexander ('02, Accounting) – Vuori
Stephen J. Brownell ('95, MSA) – Lindsay & Brownell
Jane Chau – Deloitte
Lee Duran, Board Chair ('82, Accounting) – BDO Seidman, LLP
Blaine Faulkner ('86, Accounting) – Lightfully Behavioral Health
Victor Gonzalez ('89, Accounting) – Holthouse Carlin & Van Trigt LLP
Mike Howard ('86, Accounting) – EY
Ryan Kennedy (04, Accounting) – KPMG
Dr. William Lamden – Lamden Family Trust
Sam Mascareno ('92, Accounting) – RSM US LLP
Cheryl Rhode ('93, Accounting) – West Rhode & Roberts
Laura Roos ('91, Accounting) – Moss Adams*
Paul Sager ('78 Accounting) – SAIC (retired)
Joe Strain – PwC
Keith Troutman – Baker Tilly
Peter Wall – Sempra Energy

*Retired from the board in 2024





Charles W. Lamden School of Accountancy, May 2024 (SDSU)