

# ANN BURSTEIN COHEN, CPA

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## EDUCATION AND LICENSE:

- Certified Public Accountant-New York State, License Number 048476-1, issued December 5, 1983
- M.B.A. with Distinction - Professional Accounting Option, 1982, State University of New York at Buffalo.
- Certificate of Graduation - Employee Benefits, 1975, The Institute for Paralegal Training, Philadelphia, PA.
- B.A. with Honors - Psychology, 1975, State University of New York at Binghamton

## HONORS AND AWARDS:

- Gold Charles Waldo Haskins Memorial Award (NYSSCPA) and Elijah Watt Sells Certificate of Distinction (AICPA) for performance on CPA exam.
- Dr. Emanuel Saxe Outstanding CPA in Education Award, NYSSCPA, 2011
- Distinguished Service Award, Buffalo Chapter NYSSCPA, 2011
- SOM Career Resource Center Outstanding Faculty of the Year, 2018
- Outstanding Alumnus Award 2009, University at Buffalo, Department of Accounting and Law
- Zeta Theta Chapter, Beta Alpha Psi Alumni Achievement Award, 1983
- Undergraduate Management Association Teacher of the Year -1987/88 and 1990/91
- School of Management 1996 Outstanding Contribution to Teaching Award
- Buffalo Area Chapter of NYS Society of CPAs – 1997 Service Award
- Price Waterhouse Fellow 1991/1992
- Honorary Societies - Phi Beta Kappa, Beta Gamma Sigma and Golden Key National Honor Society
- Recognized by University Career Services for “Positive Influence on Students at the University at Buffalo” 2002 and 2005

## EXPERIENCE:

- **University at Buffalo, State University of New York, School of Management, 1986-Present**
  - Clinical Associate Professor, 1999 – Present
  - Director, M.S. in Accounting Program, 2003 - Present
  - Clinical Assistant Professor, 1986 – 1999
- **Price Waterhouse, Buffalo, N.Y., 1981 - 1986**
  - Tax Manager, 1986—Responsible for all tax-related services for assigned corporate, partnership and individual clients, development of tax staff and administration of accounts.
  - Tax Senior Accountant, 1984 – 1986; Staff Accountant, 1981 – 1984—Reviewed and prepared individual, corporate, consolidated corporate, partnership,

trust and estate and exempt organization tax returns. Analyzed corporate tax provisions. Prepared tax planning analyses and investment forecasts. Researched numerous tax issues. Staff accountant experience includes nine months of audit experience.

- **Bell Aerospace**, Wheatfield, N.Y., Employee Benefits Representative, 1979 – 1981
- **Phillips, Lytle, Hitchcock, Blaine & Huber**, Buffalo, N.Y., Legal Assistant, Employee Benefits 1975 - 1979

**TEACHING**—18 credit hours per year, graduate and undergraduate levels:

- Current courses - Introduction to Federal Income Tax (undergraduate), Tax Planning for Closely-Held Businesses (graduate)
- Prior courses – Taxation of Business Entities (graduate), Tax Research (graduate), Equities and Financial Statements, Introduction to Tax Aspects of Business & Investment Planning, Principles of Accounting

### **SERVICE:**

- **School Of Management**
  - Director, MS in Accounting Program
  - Member, MBA/MS Committee (2003 – present)
  - Member, Assurance of Learning Committee (2017 – 2018)
  - Member, Search Committee- Dean, School of Management, 2016
  - Member, Search Committee- Assistant Dean & Director of Graduate Programs 2013
  - MBA Admissions/Retention Committee (2005-2013)
  - Chair, Department of Accounting & Law Curriculum Committee
  - Member, Department of Accounting & Law Scholarship Committee
  - Chair, Department of Accounting & Law Student Issues Committee (2007-2009)
  - School of Management Representative to University Faculty Senate (2005– 2008)
  - Member of seven search committees for non-tenure track accounting and business law positions (2000 – 2020)
  - Chair, “Career Opportunities in the Accounting Profession” Program, jointly sponsored by University at Buffalo School of Management and NYS Society of CPAs (2006 – 2014)
  - Member of Student Quality/Student Services Committee- 2003
  - Member of Undergraduate Committee (2002-2003)
  - Member of Steering Committee of Annual Institute on Taxation, representing School of Management
  - Director of Graduate Tax Certificate Program & Advanced Tax Seminar Series (1986 – 2003)
  - Coordinator of undergraduate accounting orientation (1995 – 2005)
  - Author of undergraduate (1995 – 2005) and M.S. accounting student manuals
- **Professional/Business/Community Organizations**
  - New York State Board of Public Accountancy (2018 – 2023)
    - Chair, Education Committee (2019 – present)
  - NASBA/AICPA *CPA Evolution* Task Force (2020 – present)
    - Tax Compliance & Planning Sub-Group

- New York State Society of CPA's-
  - Foundation for Accounting Education; President (2008-2009), Trustee (2006-2009)
  - NYSSCPA Board of Directors (2003-2006)
  - Nominating Committee—2006, 2010, 2014 (Chair)
  - Member of Academic Advancement and Higher Education Committee (2017 -2018)
  - Member of NYSSCPA Scholarship Committee (2010 – present)
  - Member of Industry Task Force (2011-2012)
  - Member of NYSSCPA Quality Enhancement Policy Committee (2009 – 2012)
  - Member of NYSSCPA Legislative Task Force (2007 – 2010)
  - Buffalo Chapter—President of Buffalo Area Chapter (2002-2003); President-Elect (2001-2002); Secretary (2000-2001); Treasurer (1999–2000); Director (1996-1998); Member of Tax Committee & Cooperation with Bar Association Committee; former Chair of Professional Development Committee; Chair of Nominating Committee (2012-2013); Past-President Advisory Taskforce (2019 – present)
- American Institute of CPA's, member, (1983–present)
- Member of committee formed by Erie County Industrial Development Agency and City of Buffalo to promote and allocate federal tax incentives provided for the Buffalo/Lackawanna Renewal Community (2003 – 2008)
- American Accounting Association and American Taxation Association
- School of Management Alumni Association—Director (1988-1997); former Treasurer and Secretary
- Member of the Advisory Board of Dopkins & Company, LLP, 2004
- Temple Beth Zion—Treasurer (2009-2010); Trustee (2004-2010); Chair, Audit Committee (2005-2009; 2011-2016)
- Jewish Community Center of Greater Buffalo Audit Committee (2019-present)

## **PUBLICATIONS:**

- Test Bank to Prentice Hall's Federal Taxation: Individuals, Published by Pearson Prentice Hall; 2012 - 2021 editions
- “Forms of Ownership and Taxation” module, University at Buffalo Micro-MBA Program for Entrepreneurs, 2011
- On-Line Study Guide to Prentice Hall's Federal Taxation—Individuals, Arthur D. Cassill and Ann Burstein Cohen—Published by Pearson Prentice Hall (Interactive Study Guide); 1999-2011 Annual Editions.
- On-Line Study Guide to Prentice Hall's Federal Taxation—Corporations, Partnerships, Estates and Trusts, Arthur D. Cassill and Ann Burstein Cohen—Published by Pearson Prentice Hall (Interactive Study Guide); 1999-2011 Annual Editions.
- “Renewal Communities Revisited: Expansion Provides Retroactive Tax Savings,” The CPA Journal, November 2006; feature article in December 7, 2006 edition of *NYSSCPA.org E-zine*
- Book Review of “Concepts in Federal Taxation” 2005 Edition, Journal of American Taxation Association, Fall 2005
- “Renewal Communities: Tax Benefits For Distressed Areas,” The CPA Journal, March 2004
- “New Tax Law Provides Challenging Curriculum for College Saving” Taxes—The Tax Magazine, September 2001; Reprinted in CCH Financial and Estate Planning and Journal of Practical Estate Planning
- "Community Renewal Tax Relief Act's Incentives for Investors—Form Over Substance?" The Tax Adviser, June 2001

- "Is the Qualified Small Business Stock Exclusion Worthwhile?" The Tax Adviser, December 1998.
- "Impact of TRA '97 on Small Businesses and Their Owners," Taxation for Accountants, December 1997; reprinted in Taxation for Lawyers, January/February 1998.
- "Home Office Deductions: Alive and Well After *Soliman*," Taxation for Accountants, May 1997.
- "State Response to Federal Tax Reform: A Case Study of New York," Ronald J. Huefner, Ann Burstein Cohen and Steven J. Weiss, State and Local Government Review, Winter 1993.
- "Survey of the Tax Reform Act of 1986," Ronald J. Huefner and Ann Burstein Cohen, Engineering Progress, Winter-Spring 1987.
- Income Tax Chapter for Principles of Accounting Supplement, University at Buffalo, 1998 – 2006 editions.

## **PRESENTATIONS:**

- University at Buffalo Organizations
  - School of Management Smart Business Practices Seminar: "How Will the New Tax Law Affect You?" (March 2018)
  - Minority Faculty/Staff Association—"Introduction to the Tax Cuts and Jobs Act of 2017" (February 2018)
  - University at Buffalo Engineer's Society—"Crash Course in Taxation and Benefits" (April 2005)
- Institute for Tax Studies
  - Critical Tax Issues for Financial & Legal Professions Series—"Current Issues relating to the Alternative Minimum Tax" and "Tax Incentives for Funding a Higher Education" (Nov. 2001)
  - Seminar on Taxpayer Relief Act of 1997—"Capital Gains & Sale of Residence Provisions of TRA '97" (Oct. 1997)
  - "UB Presents" to Tax Committee of Buffalo Area Chapter of NYS Society of CPAs—Education Tax Benefits (January 1999); Capital Gain Provisions of TRA '97 (Sept 1997)
  - UB School of Management & Law School Securities Clinic—"Tax Aspects of Investment Decisions" (April 1998)
  - Various other presentations to Center for Entrepreneurial Leadership and other business groups.
- Annual Institute on Taxation
  - Alternative Minimum Tax: Planning and Pitfalls (Nov. 2005)
  - A Fresh Look at Choice of Entity (Nov. 2004)
  - Alternative Minimum Tax for Individuals (Dec. 2003)
  - Tax Incentives for Renewal Communities (Dec. 2002)
  - Impact of Tax Law Change on Funding a Higher Education (Dec. 2001)
  - Tax Incentives for College Savings (Dec. 2000)
  - Incentive Stock Options & Non-statutory Stock Options (Dec. 1998)
  - Business Provisions of Taxpayer Relief Act of 1997 (Dec. 1997)
  - Check the Box Regulations (Dec 1996)
  - Various other topics (1989-1995)
- NYSSCPA Accounting Educators Conference—"Tips on Publishing—Professionally-Qualified Perspective" (April 2009)

- Financial Planning Association of Upstate New York 2002 Symposium “Mastering the College Funding Curriculum” (May 2002)
- Institute of Management Accountants, Niagara Chapter, 2001 Tax Update Seminar—“2001 Legislative Changes Affecting Individual Taxpayers” (Nov. 2001)
- CPA Club—“Tax Considerations of Limited Liability Companies” (Dec 1996)
- American Society of Women Accountants, Buffalo Chapter—“Limited Liability Companies and Taxes” (May 1997)

**OTHER PROFESSIONAL DEVELOPMENT:**

- Annually complete a minimum of 40 hours of continuing education relating to income tax and accounting topics primarily through attendance at conferences and seminars sponsored by the NYS Society of CPAs/Foundation for Accounting Education, the American Institute of CPAs, the American Taxation Association and national and regional CPA firms.
- Attendance at annual NYS Society of CPAs Leadership Conference—July 2001 - 2009