

Cassie Nguyen, CPA

348 Jacobs Management Center, Buffalo, NY 14260

phuongng@buffalo.edu | (716) 645-3269

SUMMARY

NYS-licensed Certified Public Accountant (CPA) and Clinical Assistant Professor with a background in tax, experiential learning, and curriculum innovation. Aspire to bridge classrooms and practice through leadership in consulting-based learning clinics, tax clinic, and global education programs. Experienced EY tax manager with a focus on family enterprises, financial planning, and instructional design for corporate training.

EDUCATION

University at Buffalo School of Management, The State University of New York

Master of Science in Accounting – Taxation Track, May 2015

- Henry A. Panasci Jr. Technology Entrepreneurship Competition, New York Business Plan Competition – Co-led a team that developed a tech startup

Bachelor of Science in Accounting, May 2014

- Beta Alpha Psi – Serve as Diversity Committee Chair, led team that earns 2nd place in the Regional Best Practices Competition for innovations on student engagement

TEACHING EXPERIENCE & ACADEMIC APPOINTMENTS

University at Buffalo School of Management, The State University of New York

Department of Accounting & Law

Clinical Assistant Professor & Assistant Chair, August 2021 – Present

Faculty Assistant Director of Project Clinic, August 2024 – Present

- Teach undergraduate and graduate courses focused on technical expertise, global perspectives, and social responsibility, with student evaluations ranging from 4.3–4.9/5.0. Courses include:
 - MGA 651 – Tax Planning for Closely Held Businesses (Graduate) with Consulting Project in partnership with UB Center of Entrepreneurial Leadership
 - MGA 403 – Introduction to Federal Income Tax (Undergraduate)
 - MGG 380 – International Business in Asia (Undergraduate)
 - MGG 199 – Corporate Responsibility: Accounting Seminar (Undergraduate)
 - MG 101 – Advancing Gender Equality & UN Sustainable Development Goals (Undergraduate)
- **Faculty Advisor, IRS Volunteer Income Tax Assistance (VITA) Program** - Oversee the School of Management's IRS-sponsored VITA Program, which received a competitive IRS VITA Grant for the Spring 2025 tax season. Under Nguyen's leadership, the program has expanded its service capacity, completing 322 returns in 2022, 433 in 2023, and 826 in 2024, while offering impactful experiential learning for students and free tax assistance to low-income community members.
- **Faculty Assistant Director of Project Clinic** – Supervise an average of 6-8 student teams per semester, managing 21 real-world consulting projects per semester that deliver effective tools to local businesses and nonprofit organizations. These projects serve as capstone-style experiences that build students' consulting, project management, and communication skills. The Clinic is a flagship experiential learning platform that fosters community impact while preparing students for future professional success.
- **Faculty Partner with School of Management Global Programs** – Faculty Co-Leader for the domestic program in Chicago, international program in Singapore and Indonesia, and serve as faculty liaison to partnership with Ho Chi Minh City University of Technology and Foreign Trade University in Vietnam.
- **Incoming Faculty Director of Master of Science in Accounting Analytics** – Appointed to lead the STEM-designated MSA program beginning Spring 2026, with responsibilities including curriculum development, student advising, enrollment support, and ensuring graduates are equipped with the

technical, analytical, and ethical competencies required in today's data-driven accounting landscape.

CORPORATE TRAINING EXPERIENCE

EY Private Tax Academy

Training Content Developer, Jan 2022 – July 2023

- Review and evaluate training material for interactive, case study-based courses at EY Private Tax Learning Academy, utilized nationwide by all EY offices in the US.
- Collaborate in enhancing learning experiences on complex topics like Net Investment Income Tax, Foreign Tax Credit, Gift Tax, Section 199A Qualified Business Income, Trust Income Tax, and Passive Activity Loss Limitations.
- Contribute to revitalizing the Private Tax Learning Map by identifying essential competencies for customized curriculum development for EY Private Tax teams serving privately held businesses and their owners.

Instructor, 2017 – August 2021

- Developed training slide decks and case studies for EY Private Tax Learning Academy's webcasts, updating materials annually to reflect current regulations.
- Delivered in-person trainings in the Buffalo office for EY Private Client Services Trainings.
- Instructed 8-hour training for classes of 30-35 students during Tax 1/Tax 2/Senior Training weeks at EY University in Chicago. Received 90% positive feedback based on post-section surveys.
- Topics covered:
 - Fundamental Concepts on Schedule K-1 Reporting, including using AI to increase productivity
 - Treatment of Schedule K-1 Reporting for Hedge Fund and Private Equity investments
 - Passive Activity Loss Limitations from Section §704(d) / §1366(d), §465, §469 and §461(l).
 - Net Investment Income Tax and Form 8960.
 - Introduction to Self-Review Process for Staffs and Seniors
 - Introduction to Private Client Services Methodology and SurePrep Training.
 - Partnership Overview and Preparing Partnership Tax Returns
 - Engagement Planning and Reviewing of Corporate Tax Returns

PUBLICATIONS, GRANTS AND PRESENTATIONS

1. Textbook: Testbank Author. *Federal Taxation 2025 Individuals, 38th edition, Franklin and Richardson. Pearson*. Authored testbank questions aligned with key learning objectives for a widely adopted tax textbook.
2. Published Article: Arlene M. Hibschweiler J.D., Martha L. Salzman J.D., Cassie Nguyen CPA, Randall P. Andreozzi J.D. *What tax litigators wish other tax professionals knew. The Tax Adviser*. Co-authored a practitioner-focused article bridging gaps between tax preparation and litigation.
3. Invited Presentation: *Do's and Don'ts to Stay on the Good Side with the IRS. UB Center of Entrepreneurial Leadership* (2022-present). Deliver practical guidance to business owners on small business tax compliance best practices.
4. Grant Work: *IRS Grant for VITA/TCE Programs. Internal Revenue Service* (2024-2025). Principal investigator for a competitive federal grant supporting the expansion of UB's VITA program, enhancing student experiential learning and providing free tax assistance to underserved communities.

PROFESSIONAL EXPERIENCE

EY Private Tax

Tax Manager Contractor, EY Private Tax – Financial Services Office, Jan 2022 – Present

- Oversee tax compliance and tax planning, team of a Private Equity G360 account
- Content Developer for training materials in EY Private Tax Academy

Tax Manager, EY Private Tax, October 2015 – August 2021

- Oversee tax compliance and tax planning for ultra-high-net-worth individuals, multinational corporations, partnerships, real estate investment funds, and trusts held in private equity and hedge funds.
- Specialize in family enterprises, offering comprehensive tax advice on personal and family matters, business governance, wealth transfer, and succession planning.
- Received EY Bravo Recognition Awards 27 times for exceptional performance.
- Globally supervise staff and seniors, offering technical training, performance feedback, and career mentoring.
- Support technology initiatives, including developing quality assurance frameworks for new tax applications and optimizing processing efficiency with AI tools.
- Led training sessions and developed materials for EY Private Tax Academy provided to global staffs.
- Support firm's community involvement such as 43North Start-up Competition.

Arvato Systems North America, New York, NY

Financial Analyst Intern, Summer 2013

- Streamlined the employee utilization analysis by developing Macros that reduced 75% user time.
- Performed various budgeting and performance analyses to support the CFO.
- Ensured internal controls applied in accounts payables functions.

Women and Children Hospital of Buffalo, Buffalo, NY

Research Assistant in the ER, Summer 2012

SCHOOL & UNIVERSITY SERVICE

Office of International Education

- Faculty Lead for the First-Year Global Experience Program in Costa Rica (Winter 2024)

School of Management

- Faculty Partner for Global Program
 - Experience the Globe – International Business in Asia (2024 – present)
 - Experience the 50 – Leadership, Industry and Culture in Chicago (2023)
- Faculty Advisor for IRS Volunteer Income Tax Assistance Program (2021 – present)
- Committee Member for SOM Policy Committee (2023 – present)

Department of Accounting & Law

- Academic Event Coordinator for:
 - Sufrin Lectureship Series
 - PwC Challenge Case Competition
 - Accounting Information Session
- Committee Lead for:
 - Scholarship & Fellowship Committee
 - Teaching Assistant Hiring Committee for MGA201/202
- Committee Member for:
 - MS Accounting Admissions Committee
 - CPA Evolution Committee
 - Appeals Oversight Committee
- Faculty Liaison for:
 - Meet the Professional with SOM Career Resource Center

- Firm Recruiting Meetings with SOM Career Resource Center
- Admitted Student Open House event with SOM staffs
- Undergraduate Curriculum and Advising with SOM Undergraduate Program Office
- Tax Panel Technical with BAP & UBAA
- Accounting Awards Banquet with Scholarships & Fellowships Updates
- Accounting Newsletter for Sufrin Lectureship, PwC Challenge, Scholarships & Fellowships, and VITA Updates

LEADERSHIP & COMMUNITY INVOLVEMENT

Journey's End Refugee Services of Buffalo

Immigrant Leadership Fellow Program, Member (2024 – present)

- Contribute to program development focused on empowering immigrant communities through education and access to resources. Collaborate with other immigrant community leaders to assess and design workshop topics beneficial for immigrants, including financial literacy and tax readiness.

Erie County Commissioner Status of Women Award

Women Educator and Leader Honoree, 2024

- Recognized as a woman educator and community leader for contributions to underrepresented communities' empowerment and education, including women.

American Institute of Certified Public Accountants

AICPA, REG / TCP Exam Committee, Member (2023 – present)

- Review and update CPA exam content for Regulation and Tax Compliance & Planning sections to ensure alignment with current professional standards and practice. Provide expert insight on curriculum relevance and candidate preparedness.

American Accounting Association & American Taxation Association

American Accounting Association Conference on Teaching and Learning in Accounting, Steering Committee, Member (2024 – present)

- Collaborate with fellow accounting educators to shape the annual conference agenda, curate sessions on innovative pedagogy, and promote inclusive teaching strategies in accounting education.

New York State Society of Certified Public Accountants

NYSSCPA, Education Night Committee, Member (2022 – present)

- Support the coordination of annual events that connect students and early-career professionals with seasoned CPAs through panels, networking, and scholarship recognition.

NYSSCPA & School of Management, Tax Institute Planning Committee, Member (2021 – present)

- Assist in designing content and selecting expert speakers for Western New York's premier tax conference, aimed at keeping tax professionals informed on legislative updates and best practices.

Certified Public Accountant (CPA) in New York.

License number #122832, 2016 – Present

- Annually complete a minimum of 40 hours of continuing professional education (CPE) primarily through attendance at conferences and seminars sponsored by the NYS Society of CPAs/ Foundation for Accounting Education, the American Accounting Association (AAA), and national and regional CPA firms.
 - American Tax Association Mid-Year Meeting
 - American Accounting Association Annual Meeting
 - American Accounting Association Conference on Teaching and Learning in Accounting
 - EY Tax Symposium
 - EY Tax Tech Conference
 - EY Wealth Transfer Institute

- EY ARC Colloquium Conference
- PwC Accounting Symposium