

Cassie (Phuong) Nguyen, CPA

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EXECUTIVE SUMMARY

Teaching taxation at the University at Buffalo for undergraduates and graduates. Tax professional with a specialty in privately held businesses and their high-net-worth families. Dedicated to creating a learning environment that fosters growth, supporting academic excellence and career advising for students. Strive to help each student achieve their full potential and succeed in the ever-evolving accounting and tax profession.

EDUCATION

2010 - 2015 UNIVERSITY AT BUFFALO, THE STATE UNIVERSITY OF NEW YORK

- Master of Science in Accounting – Concentration in Tax
- Bachelor of Science in Accounting

PROFESSIONAL LICENSE

2016 - Present Certified Public Accountant (CPA) in New York. License number #122832.

PROFESSIONAL EXPERIENCE

2021 - Present UNIVERSITY AT BUFFALO SCHOOL OF MANAGEMENT

DEPARTMENT OF ACCOUNTING & LAW - Buffalo, NY

Clinical Assistant Professor

Assistant to the Chair

- Teaches undergraduate & graduate courses
 - MGA403 Introduction to Federal Income Tax (undergraduate)
 - MGA651 Tax Planning for Closely Held Business and its Business Owners (graduate)
 - MGG199 Corporate Responsibility - Accounting Seminar (undergraduate)
- Serves as Assistant to the Chair, with overall leadership responsibility for the undergraduate activities, including leading department events, job-placement efforts, speaker events, stewardship process for scholarships and fellowships, and engagement in the professional community.
- Co-writer for the article “What Litigators Wish Tax Professionals Knew” submitted to the Tax Adviser
- Serves as Faculty Advisor to the School of Management Volunteer Income Tax Assistance Program (VITA)

2022 - Present ERNST & YOUNG US LLP - National

Learning Council Contractor, EY Private Tax Learning Academy

- Review and assess the training material for relevance and effectiveness for interactive, case study-based courses for EY Private Tax Learning Academy that is used broadly by all EY offices across United States.
- Assist in creating a more engaging and participatory learning environment for both trainer and trainees on challenging topics such as Net Investment Income Tax, Foreign Tax Credit, Gift Tax, Section 199A Qualified Business Income, Trust Income Tax, Passive Activity Loss Limitations, Schedule K-1 at both intermediate and advanced levels.
- Assist in rejuvenating the Private Tax Learning Map by identifying key competences needed to be covered in customized curriculum for EY Private Tax teams working simultaneously with privately held businesses and its business owners.

2022 ERNST & YOUNG US LLP – New York, NY

Tax Manager Contractor, EY Private Tax – Financial Services Office

- Provided professional tax services for business owners and passthrough entities in the financial service industry.
- Reviewed private equity and hedge fund Schedule K-1s and leveraged Artificial Intelligence tools to enhance K-1 processing efficiency.

- Lead Instructor for training sessions for EY Private Tax Academy.
- Help EY Private Tax Learning Team with updating training materials.

2015 - 2021 ERNST & YOUNG US LLP - Buffalo, NY
Tax Manager, EY Private Tax Services

- Provide professional tax services for a wide-range portfolio of clients from entities to families, in accordance with Internal Revenue Code, States & Local, AICPA and constantly evolving tax legislations from TCJA 2017, CARES ACT 2020.
- 27 times recipients of EY Bravo Recognition Awards for outstanding performance.
- Areas of expertise on family enterprises, support the complex range of tax matters impacting private business operations and private wealth, including personal and family tax advice for trusts and individual, business tax advice for partnerships and S-corp, family and business governance, wealth transfer and succession planning. Closely manage client relationships with both family and business side of major Western New York S-corp client accounts.
- Gain diverse experiences in tax compliance for multi-national corporations, tiered partnerships with applications of 704(c), real estate investment partnerships, reviewing tax provisions under ASC740, including tax provision for carved-out financial statement.
- Supervise staffs and seniors globally, provide technical trainings and on-the-job coaching, conduct ongoing performance feedbacks and career mentoring. Support Counselees' professional development and present their performance at roundtable.
- Support technology transformation initiatives by developing quality assurance frameworks for new tax applications adopted by offices across East region. Coordinate with experienced users in Passive Foreign Investment Company tool to incorporate Artificial Intelligence of K-1 digestion into the tool.
- Provide tax expertise for a technology project that develops a multi-tiered partnership workpaper that could automate the onboarding of 350+ entities and 30+ tax equity partnerships.

2013 ARVATO SYSTEMS NORTH AMERICA. New York, NY
Financial Analyst Summer Intern

- 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.

2012 WOMEN AND CHILDREN'S HOSPITAL OF BUFFALO. Buffalo, NY
Research Assistant

- Screened and interview with patients in emergency room for clinical studies.
- Organized studies result following phone interviews with outpatients.

ADDITIONAL TEACHING EXPERIENCE

2019 - 2021 EY Private Tax Learning Academy
Training Content Developer

- Develop training slide decks and case studies to be presented at EY Private Tax Learning Academy's webcasts. Lead a team to update these training materials to current regulations every year. 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).
 - Introduction to Self-Review Process for Private Tax Services for tax staff and seniors.

2017 - 2021 EY Private Client Services Trainings
Instructor

- Develop and deliver in-person training for new staffs and new seniors annually in Buffalo office. Led a team to update materials and practice presenting. Gather feedbacks to further enhance next training programs. Topics covered:
 - Introduction to Private Client Services Methodology and SurePrep Training.

- Net Investment Income Tax and Form 8960.
- Introduction to Self-Review Process for Private Client Services.

**2017 - 2021 EY University
Instructor**

- Instruct 8-hour trainings for classes of 30-35 students in Tax 1/Tax 2/Senior Training weeks. Received 90% positive feedbacks based on post-section surveys. Communicated training suggestions to leadership. Topics covered:
 - Introduction to Private Tax Services Methodology
 - Partnership Overview and Preparing Partnership Tax Returns
 - Engagement Planning and Reviewing of Corporate Tax Returns

PROFESSIONAL ASSOCIATIONS

- American Institute of Certified Public Accountants
- New York State Society of Certified Public Accountants
- American Accounting Association
- American Taxation Association
- Beta Alpha Psi

SCHOOL OF MANAGEMENT & UNIVERSITY SERVICE

- School of Management, Global Program Experience the 50, Faculty Leader for Leadership, Industry and Culture Program in Chicago (2023)
- School of Management, Volunteer Income Tax Assistance Program (VITA), Faculty Advisor (2021 – present)
- School of Management, Admitted Students Open House Event, Presenter for Accounting
- Department of Accounting & Law, Appeals Oversight Committee, Coordinator (eff. Fall 2023)
- Department of Accounting & Law, Meet the Professional, Faculty Liaison with CRC (eff. Fall 2023)
- Department of Accounting & Law, BAP & UBAA Technical, Tax Faculty Liaison
- Department of Accounting & Law, Scholarship & Fellowship Committee, Coordinator
- Department of Accounting & Law, 201/202 Teaching Assistant Hiring Committee, Coordinator
- Department of Accounting & Law, Accounting Information Session Event, Coordinator
- Department of Accounting & Law, Sufrin Lectureship Event, Coordinator
- Department of Accounting & Law, PwC Challenge Case Competition, Faculty Coordinator
- Department of Accounting & Law, CPA Evolution Committee, Tax Faculty Coordinator
- Department of Accounting & Law, Career Resource Center Recruiting Meeting, Faculty Liaison
- Department of Accounting & Law, Undergraduate Program Office, Faculty Liaison
- Department of Accounting & Law, MS Accounting Admissions Committee, Member
- Department of Accounting & Law, Accounting Awards Banquet Committee, Member
- Coordinator for the following departmental responsibilities as Assistant to the Chair:
 - Accounting Student Listserv, Coordinator
 - Audit of Student Prerequisites, Coordinator
 - Audit of Student Registration, Coordinator
 - Alumni Database, Coordinator
 - Accounting Resource Center, Coordinator
 - Awards & Scholarships on Commencement Program, Coordinator
 - Departmental Documentation, Coordinator
 - Departmental Website, Coordinator
 - Scholarship & Fellowship Website, Coordinator
 - Scholarship & Fellowship Academic Works, Coordinator
 - FASB Codification Site, Coordinator
 - Handbook for Department of Accounting and Law, Coordinator
 - Course Catalog for Department of Accounting and Law, Coordinator
 - Professional Licensing Requirements, Coordinator
 - Student Awards and Scholarships, Coordinator

- Accounting Newsletter, Contributor for Sufrin Lectureship, PwC Challenge, Scholarships & Fellowships, and VITA

PROFESSIONAL SERVICE & COMMUNITY INVOLVEMENT

- Faculty lead for Tax Impact Project in partnership with Center for Entrepreneurial Leadership (CEL). This consulting project brings tax track students in the MS Accounting program to assist the entrepreneurs and small businesses owners in the Minority and Women Emerging Entrepreneur Program through CEL. (2023 – present)
- AICPA, REG / TCP Exam Subcommittee, Member (2023 – present)
- NYSSCPA, Education Night Committee, Member (2022 – present)
- NYSSCPA, Career Opportunities in the Accounting Profession Program (COAP) Committee, Member (2023 – present)
- NYSSCPA & School of Management, Tax Institute Planning Committee, Member (2021 – present)
- Faculty liaison for EY Campus Recruiting for accounting recruiting events at UB (2022 – present)
- EY team member for conducting quarterly quality interviews with 43North winners. (2019 – 2021)
- EY People Counselling Family with responsibilities in managing and advising counselees (e.g., goal setting and progress towards developmental goals, CPA exam planning and studying, performance management) (2019-2021)

PROFESSIONAL DEVELOPMENT ACTIVITIES

- Annually complete a minimum of 40 hours of continuing professional education (CPE) primarily through attendance a 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
- PwC Accounting Symposium