Brianne C. Smith, PhD, CPA/PFS, ABV
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334-310-9520

EDUCATION
Doctor of Philosophy
Financial and Retirement Planning
The American College of Financial Services, October 2020

Master of Business Administration
Concentration: Accounting
Auburn Montgomery, May 2002

Bachelor of Science in Commerce & Business Administration
Major: Accounting; Minor: English
University of Alabama, May 2001

CERTIFICATIONS
CPA - Certified Public Accountant, August 2002
PFS - Personal Financial Planning Specialist, March 2012
ABV - Accredited in Business Valuation, May 2017

EXECUTIVE COMMITTEES
American Institute of Certified Public Accountants Personal Financial Planning Executive Committee (Appointment)
May 2022 - Present

Auburn Women's Philanthropy Board Executive Committee, Auburn University
May 2021 – Present

AICPA Uniform CPA Examination Passing Score Panel for the Tax Compliance and Planning (TCP) section
January 2024

TEACHING AWARDS
Winn and Gordon Chappell Academic Enrichment Award for excellence in teaching. Huntingdon College. April 2018.

RESEARCH GRANT
Graduate Student-Faculty Research Grant - $5,000; Project: Cryptocurrency Investment Experience Impact on Equity Investor Behavior; October 2021

PROFESSIONAL AWARD
'Standing Ovation' for Top Young CPA in Personal Financial Planning. American Institute of Certified Public Accountants. June 2017.

COURSES TAUGHT
ACCT 201/2010 – Principles of Accounting I
ACCT 201 - Principles of Accounting I (Online)
ACCT 202 – Principles of Accounting II
ACCT 202 – Principles of Accounting II (Online)
ACCT 301/3110 – Intermediate Accounting I
ACCT 302 – Intermediate Accounting II
ACCT 321 – Cost Accounting
ACCT 335 – Individual Income Taxation and Planning
ACCT 350/3200 – Accounting Information Systems
ACCT 371 – Seminar in Accounting
ACCT 403 – Advanced Accounting
ACCT 435 – Business and Fiduciary Taxation and Planning
ACCT 441 – Governmental and Not-for-Profit Accounting
ACCT 481 – Internship in Accounting
ACCT 499 – Senior Capstone in Accounting
ACCT 6210 – Advanced Accounting Information Systems
ACCT 6220 – Managerial Application of Accounting Information (Online)
ACCT 6330 – Research in Federal Taxation (Online)
ACCT 6750 – Financial Accounting Theory

TEACHING EXPERIENCE
Assistant Professor of Accounting, Auburn Montgomery
January 2020 – Present
- Teach undergraduate and graduate level courses, in-person and online
- Supervise graduate research assistant (2021-2022)
- Faculty Advisory, Phi Beta Lambda (2021-2022)
- Committee member, Associate Dean search committee (2022)
- Committee member, Faculty Development (2021-2022)
- Committee member, Scholarship and Honors (2022-2025)
- Committee member, Outreach (2022-2024)
- Committee member, COB Dean search committee (2024)
- Committee member, AI professor search committee (2024)
- Appointed to Insurance and Benefits Committee, Auburn University (2023-2025)

Assistant Professor of Accounting, Huntingdon College
August 2014 – August 2019
- Accounting Program Coordinator (2014-2016, 2019)
- Coordinating opportunities for students to interview for internships and full-time jobs
- Organizing an accounting club for students to gain professional soft skills
- QEP Committee for SACS accreditation (2018-2019)
- Member of the Travel Committee (2017-2018)
- Secretary of the Curriculum Committee (2015-2017)
- Member of the Academic Services Committee (2014-2015)
- Coordinate student interviews for Accounting Interview Day
- Started and Coordinated Meet the Accounting Firms events
- Coordinate with Impact Alabama, student volunteer opportunity: Savefirst
- Coordinate student volunteer opportunities with the Montgomery Museum of Fine Arts
- Plan and coordinate student visits to graduate school campuses
- Prepare Assessment Reports, Plans, and Course Reflections
- Faculty Advisor – Alpha Kappa Alpha Sorority

TEACHING EXPERIENCE (Continued)
Assistant Professor of Accounting, Huntingdon College

- Academic advising for accounting students
- Teach undergraduate courses

PROFESSIONAL WORK EXPERIENCE
Independent Financial Advisor, Brianne Financial, LLC
October 2019 - Present

- Financial planning
- Estate and Gift planning
- Succession planning
- Income tax planning
- Retirement income planning
- Behavioral financial coaching
- Investment management

PROFESSIONAL WORK EXPERIENCE (Continued)
Managing Member, Brianne C. Smith, CPA, LLC
December 2016 – Present

- Business valuations
- Litigation support
- Divorce consulting
- Tax preparation and planning for estates, trusts, individuals, gift, and businesses
- Mergers & acquisitions
- Internal control design
- Bookkeeping and payroll tax filings
- Process and technology analysis and planning
- Business strategic growth
- Data analytics

Manager, Warren Averett, LLC
September 2001 – August 2014

- Specialize in tax planning and compliance
- Prepare tax returns for estates, trusts, individuals, gift, and businesses
- Estate and financial planning for high-net-worth individuals
- Financial planning and consulting
- Charitable gift planning
- Retirement income planning
- Managing team in the estate and trust group
- Financial statement preparation
- Audits of low-income housing tax credit partnerships
- SOX Compliance
- Work closely with the wealth management group and business valuation support
- Conduct various consulting and planning engagements
- Involved in special projects, such as leading our estate and trust group marketing team, recruiting, training, relationship building, public speaking and writing

EXPERT WITNESS (Settled Prior to Testimony)

Meany v. Meany (Divorce), *Circuit Court of Montgomery County, Alabama*

Reginald Patterson et al v. Raymond Poole and FedEx Corporation (Personal Injury), *Circuit Court of Montgomery County, Alabama*

Whitten v. Whitten (Divorce), *Circuit Court of Autauga County, Alabama*

Dennis v. Christian (Real Estate), *Circuit Court of Montgomery County, Alabama*

PEER-REVIEWED PUBLICATION

Smith, B. & Finke, M. (2023). Women and Finance-Specific Human Capital: Impact of Gender Role Attitudes. *Journal of Accounting and Finance*. 23(6). 144-162.

Smith, B. (2019). The Life-Cycle and Character of Crypto-Assets: A Framework for Regulation and Investor Protection. *Journal of Accounting and Finance*. *19(1).* 156-168.

PUBLICATIONS

Smith, B. (2024). Preparing accounting students for a career in CPA financial planning. *Journal of Accountancy*. January 2024.

Smith, B. (2022). I Bonds provide a flexible, tax-advantaged method for saving for children's education. *The Tax Adviser*. September 2022.

Smith, B. (2019). Risky business: Risk tolerance and financial decisions in divorce. *Divorce Financial Analyst Journal. 19(5).*

*Wilson, B. (2017). Advice From a Seasoned Pro: Deduct Work-Related Education as a Business Expense. Textbook box insert in: Garman and Forgue. *Personal Finance 13th edition.* Cengage. *Maiden Name: Wilson

WORKING PAPER SUBMITTED AND UNDER REVIEW

Smith, B. & Finke, M. (2023). Did Crypto Make Young Investors Overconfident? Submitted to Financial Planning Review in August 2024.

WORKING PAPERS

Smith, B. (2024) Incorporating Personal Financial Planning into Tax Courses (Target: Tax Adviser)

Smith, B. (2024). Opportunities to Integrate Personal Financial Planning into CPA Model Accounting Curriculum (Target: Issues in Accounting Education)

Smith, B. & Fargarson, C. (2022). Accounting for Cryptocurrency Utility. (Target: Digital Accounting Journal)

Smith, B. (2022). From Bitcoin to Libra: The Ethical Function of Cryptocurrency

Smith, B. (2019). Governance of blockchain adoptions in financial advisory firms.

INVITED TALKS

"CPA Financial Planner Workshop." Auburn University Montgomery. Beta Alpha Psi Workshop series. Montgomery, AL. September 2024.

"Own Your Influence." AMD Creative. Professional Development Meeting September 2024.

"Integrating PFP into Accounting Curriculum." AICPA PFP Champions Quarterly Meeting. August 2024.

"LEDxtra: Artificial Intelligence 101." AUiX Conference. Accounting Expert on Panel. July 2024.

"Own Your Influence." East Alabama Society for Human Resource Management (EASHRM) Chapter meeting speaker for Women in Leadership. March 2024.

"CPA Financial Planner Workshop." Auburn University Beta Alpha Psi Workshop series. Auburn, AL. October 2023.

Panelist: Royal Intervention Seminar. Financial Expert on Panel. April 2022.

"Financial Wellness Mini-series: Planning for the Future." Presented to the members of Frazer United Methodist Church. August 2021.

"Financial Literacy Workshop." Presented to the young ladies in the Leadership Development Circle program for Women in Training, Inc. May 2021.

"The CARES Act for Nonprofits." Presented to the members of the Auburn University Cary Center for Advancement of Philanthropy and Nonprofits. April 2020.

"Why the Personal Balance Sheet Matters." CEO Roundtable. March 2020.

"A Personal Capital Approach to Financial Independence." Presented to AUM Financial Management Association. February 2020.

"Own Your Influence: A personal capital approach to financial independence for women." Presented to the Auburn Women's Philanthropy Board. November 2020.

"The CARES Act for Nonprofits." Presented to the members of the Auburn University Cary Center for Advancement of Philanthropy and Nonprofits. April 2020.

"Four Ways Women Can Avoid Financial Vulnerability." Presented to the Phi Mu Fraternity. Huntingdon College. February 2020.

"What are you Worth?" Presented to the Accounting and Business Club at Huntingdon College. October 2019.

"How to Make A's in Your Classes: Using Metacognition to Learn." Presented to academically struggling athletes at Huntingdon. Organized by Sigma Nu Fraternity. March 2019.

"Three Traps that will Steal a Woman's Financial Independence." Chi Omega Sorority. Huntingdon College. September 2018.

INVITED TALKS (Continued)

"Taxes for Realtors: Update on the New Tax Law, Retirement Planning and Cryptocurrency." River Region Realty Group, LLC. Montgomery, AL. April 2018.

"Financial Independence for Women." Phi Mu Fraternity. Huntingdon College. February 2018.

"Taxes for Realtors: Update on the New Tax Law, Retirement Planning and Cryptocurrency." Women's Council of Realtors. February 2018.

"Special Tax Topics." Financial Peace University. Frazer United Methodist Church. October 2017.

"Why Does the Balance Sheet Matter?" Board of Trustees Retreat. Huntingdon College. May 2017.

"Financial Literacy for College Students." Financial Literacy Workshop. Huntingdon College. April 2017.

CONFERENCE PRESENTATIONS

"Implementing Artificial Intelligence into Accounting Processes." Financial Accounting & Auditing Conference. ASCPA. September 2024.

CPA Credentials Panel. American Accounting Association Leadership In Accounting Education conference. PFS and ABV representative. February 2024.

"Integrating Personal Financial Planning into Accounting Programs." AICPA Faculty Hour Webcast and 1 hour CPE. January 2024.

"Artificial Intelligence for Academic Research and Accounting Curriculum." Alabama Society of CPAs, Accounting Educators' Conference. October 2023

"Did Crypto Make Young Investors Overconfident?" Financial Planning Association, Research Showcase: FPA Annual Conference 2023, Pheonix, AZ, September 2023

"Planning for established Career Professionals (Ages 41-50)" Investments & Wealth Institute, Life Cycle Planning conference, September 2023

"Navigating Artificial Intelligence in Tax and Planning." Alabama Society of CPAs, Sip and CPE 4 hour in person course, Auburn, AL, August 2023

"Personal Financial Planning in the Curriculum." Alabama Society of CPAs, Accounting Educators' Conference. October 2022.

"Women and Finance-Specific Human-Capital: Impact of Gender Role Attitudes." Critical Perspectives of Accounting Journal, Special Call for Papers workshop, Presenter and Discussant for another author's paper. June 2022

"Tax Influence on Senior Behavior and Well-Being." Presented by K. Eller, co-author. Behavioral Tax Symposium. George Mason University. June 2019.

"If I had a Million $: An Account of the Human (Financial) Condition." What It Means to be Human Mini-Conference. Huntingdon College. October 2018.

CONFERENCE PRESENTATIONS (Continued)

"Simulating Stock and Cryptocurrency Student Investing Activities in Financial Accounting and Taxation Courses." Teaching and Technology Workshop at the American Accounting Association (AAA) Conference on Teaching and Learning in Accounting. August 2018.

"Me, Myself and Money: 2018 Financial Decisions for the Dual-Self." 2018 Spring Professional Development Training Conference. Association of Government Accountants. Montgomery, AL. May 2018.

"Risk Tolerance and Financial Decisions in Divorce." Social Justice Mini-Conference. Huntingdon College. November 2017.

PAPER REVIEWER

"Price Waterhouse v. Hopkins: Landmark Sexual Discrimination Lawsuit." Reviewed paper for the AAA Annual Conference in August 2019, Academy of Accounting Historians Section.

BOARD MEMBER EXPERIENCE

- Board of Stewards, Frazer United Methodist Church (2003-2006), (2009-2012), (2017-2021)
- Chairman, Charitable Trust Board, Frazer United Methodist Church (2009-2012)
- Board member, Charitable Trust Board, Frazer United Methodist Church (2003-2006)
- Board Member, Montgomery Estate Planning Council (2013-2014)
- President, Montgomery Chapter of the Alabama Society of CPAs (2004-2007)
- Loaned Executive, United Way (2010-2011)
- Board of Directors, Alabama Society of CPAs (ASCPA); May 2004–May 2006

COMMUNITY INVOLVEMENT AND SERVICE

- Member – Women Business Owners in the River Region
- Certified Tax Volunteer, Savefirst free tax preparation services, Impact Alabama
- Bidding Assistant, Annual Art Auction, Montgomery Museum of Fine Arts
- Serve on the ASCPA Diversity and Inclusion Committee
- Partner and attend the Accounting Pilot and Bridge Project in Alabama
- Past CPA Ambassador for the Alabama Society of CPAs
- Sunday School teacher at Frazer United Methodist Church for adult women (2015-2017)
- Bible Study leader at Huntingdon for college women, Ligon Ladies (2016-2017)
- Facilitator for Dave Ramsey's Financial Peace University at Frazer United Methodist Church
- Speaker in classrooms, chapter meetings, workshops, WSFA tax hotline and radio and television interviews.

PROFESSIONAL AFFILIATIONS

American Accounting Association
American Institute of Certified Public Accountants
Alabama Society of Certified Public Accountants
Montgomery Estate Planning Council