

Cassie Nguyen, CPA

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EDUCATION

University at Buffalo, The State University of New York

Master of Science in Accounting, May 2015

- Concentration in Taxation
- Henry A. Panasci Jr. Technology Entrepreneurship Competition - Semi Finalist
- New York Business Plan Competition – Finalist

Bachelor of Science in Accounting, May 2014

- Beta Alpha Psi – Diversity Committee Chair
- Beta Alpha Psi – Regional Best Practices Competition 2nd place

TEACHING EXPERIENCE

University at Buffalo – School of Management, Department of Accounting & Law

Clinical Assistant Professor & Assistant Chair, August 2021 - Present

- Teaches undergraduate & graduate courses
 - MGA651 Tax Planning for Closely Held Business and its Business Owners (graduate)
 - MGA403 Introduction to Federal Income Tax (undergraduate)
 - MGG380 International Business in Asia (undergraduate)
 - MGG199 Corporate Responsibility - Accounting Seminar (undergraduate)
 - MG101 Advancing Gender Equality in Management & UN SDGs (undergraduate)
- Assistant Chair of the Department, with overall leadership responsibility for the undergraduate activities, including leading department academic events, placement efforts, speaker events, administration of scholarships and fellowships, and engagement in the professional community (see details below)
- Faculty Partner for SOM Global Program & UB Office of International Education
- Faculty Advisor for IRS Volunteer Income Tax Assistance Program

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 trainings for classes of 30-35 students during Tax 1/Tax 2/Senior Training weeks at EY University in Chicago. Received 90% positive feedbacks 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

SCHOLARLY CONTRIBUTIONS & PRESENTATIONS

1. 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.***
2. Presentation: *Do's and Don'ts to Stay on the Good Side with the IRS. **UB Center of Entrepreneurial Leadership.***
3. Textbook: Testbank Author. *Federal Taxation 2025 Individuals, 38th edition, Franklin and Richardson. **Pearson.***
4. Grant: *IRS Grant for VITA/TCE Programs.* (In progress)

PROFESSIONAL EXPERIENCE

EY Private Tax

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

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 & PROFESSIONAL AFFILIATIONS

American Institute of Certified Public Accountants

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

American Accounting Association & American Taxation Association

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

New York State Society of Certified Public Accountants

- NYSSCPA, Education Night Committee, Member (2022 – present)
- NYSSCPA & School of Management, Tax Institute Planning Committee, Member (2021 – present)
- NYSSCPA, Career Opportunities in the Accounting Profession Program (COAP) Committee, Member (2023)

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