

MATTHEW HARRISON LEVIN, Ph.D., CPA
CURRICULUM VITAE

Clinical Associate Professor of Accounting
Campbell School of Business
Berry College
Department of Accounting, Finance, and Economics
P.O. Box 495024
Green Hall 202
Mount Berry, GA 30149-5024

Office telephone: 706.368.4070
Cellular telephone: 404.307.8345
mlevin@berry.edu

EDUCATION

CASE WESTERN RESERVE UNIVERSITY

CLEVELAND, OH

Ph.D. in Management: Designing Sustainable Systems

Weatherhead School of Management

Graduation date: August 2017

GPA: 4.00

Awarded a DM Fellowship, Fowler Center for Business as an Agent of World Benefit

Research Interests: Growth of the sustainability movement, corporate social responsibility, and how accounting performance measurements and tax incentives can contribute to this effort.

Dissertation Title:

“The Role of an Ethos of Sustainability: The Hidden Value of Intangible Resources” (April 2017).

Ph.D. Committee:

- Chris Laszlo, Ph.D., (Committee Chair) Char and Chuck Fowler Professor of Business as an Agent of World Benefit; Weatherhead School of Management, Case Western Reserve University, Cleveland, OH.
- Richard J. Boland, Ph.D., Professor – Design & Innovation; Weatherhead School of Management, Case Western Reserve University, Cleveland, OH; Senior Research Fellow, Judge Business School, University of Cambridge, Cambridge, UK.
- Marc J. Epstein, Ph.D., Distinguished Research Professor of Management; Jesse H. Jones Graduate School of Business, Rice University, Houston, TX.
- Aron Lindberg, Ph.D., Assistant Professor – Information Systems; Stevens Institute of Technology, Hoboken, NJ.
- Roger B. Saillant, Ph.D., Adjunct Professor – Design and Innovation; Weatherhead School of Management, Case Western Reserve University, Cleveland, OH.

Unpublished Research Papers in the Weatherhead School of Management:

- Mixed Methods Research Paper: “*Beyond the Bottom Line: An Examination of the Relationships between a Corporate Sustainability Ethos and Intangible Resources*”. Advisors: Chris Laszlo, Ph.D. and Aron Lindberg, Ph.D. (March 2017).
- Quantitative Research Paper: “*Looking beyond the Bottom Line: Connecting the Dots between a Business Enterprise’s Sustainability Initiatives and Financial Performance*”. Advisors: Chris Laszlo, Ph.D., Marc J. Epstein, Ph.D., and Aron Lindberg, Ph.D. (October 2016).
- Qualitative Research Paper: “*Looking beyond the Bottom Line: Connecting the Dots between a Business Enterprise’s Sustainability Initiatives and Growth in Financial Value*”. Advisors: Richard J. Boland, Jr., Ph.D., Karen W. Braun, CPA, Ph.D., and Chris Laszlo, Ph.D. (July 2015).

Conferences Attended:

- Academy of Management Annual Conference, Atlanta, GA (2017).
- American Accounting Association Annual Conference, New York, NY (2016).
- Southern Federal Tax Institute, Atlanta, GA (2015).
- Academy of Management Annual Conference, Philadelphia, PA (2014).
- Heckerling Institute on Estate Planning, University of Miami School of Law, Miami, FL (1997, 1998, 1999, 2000, 2001, 2002).

Conference Research Paper Reviewer:

- Academy of Management Annual Conference (2016).

Other Research in Progress:

- Mixed Methods Research Paper: *Currently Untitled*, and extending the work of my Ph.D. Dissertation. Co-Author: Aron Lindberg, Ph.D., Assistant Professor, Stevens Institute of Technology.

GEORGIA STATE UNIVERSITY**ATLANTA, GA****Executive MBA, 2012**

J. Mack Robinson College of Business

Curriculum included courses in accounting, finance, strategy, global business and executive leadership.

GPA: 4.04

Master of Taxation, 1982

Curriculum included courses in taxation of corporations, partnerships, estates and trusts, corporate mergers & acquisitions, IRS practice and procedure.

GPA: 3.75

Inducted to Tau Alpha Chi

FLORIDA STATE UNIVERSITY**TALLAHASSEE, FL****Bachelor of Science, Accounting and Finance (Double Major), 1978**

GPA: 3.55, Cum Laude

Inducted to Beta Gamma Sigma

Inducted to Beta Alpha Psi

OTHER PROFESSIONAL EDUCATION**Chartered Mergers & Acquisitions Professional (CMAP)**

National Association of Chartered Valuators and Analysts (NACVA) (2012)

A 4-day curriculum in Washington, D.C. that focused on numerous M&A topics and issues. A comprehensive final examination was required in order to obtain the CMAP certification.

Values Based Leadership

Georgia State University Center for Ethics and Corporate Responsibility/United States Marine Corps; The Basic School, USMC, Quantico, VA (2012)

A physically rigorous and mentally intensive 3-day leadership course, taught by GSU and the USMC. The curriculum included essential military procedures, equipment and techniques, ethical and strategic decision-making in "the fog of war," nighttime and daytime field evolutions, and briefings with senior officers at The Basic School.

UNIVERSITY TEACHING EXPERIENCE**GEORGIA STATE UNIVERSITY****ATLANTA, GA****J. Mack Robinson College of Business****Adjunct Instructor****Courses Taught in the Master of Professional Accounting Program:**

ACCT 8005 – “Current Issues in Accounting”

- Spring Semester 2017
- Fall Semester 2016
- Spring Semester 2016
- Fall Semester 2015
- Spring Semester 2015

ACCT 8120 – “Advanced Federal Income Taxation”

- Spring Semester 2017
- Spring Semester 2016

Guest Speaker for various graduate business courses at GSU:

- Master of Taxation Program (2017)
- Master of Professional Accounting Program (2014)
- Executive MBA Program (2012)
- Professional MBA Program (2012)

Honors Mentor Program: In 2014 I was asked to serve as a professional mentor for an undergraduate honors accounting major in the Robinson College of Business at GSU. I mentored one accounting student during the 2014-2015 academic year and another accounting student during the 2015-2016 academic year.

OTHER TEACHING AND PUBLIC SPEAKING EXPERIENCE

I am a student of effective public speaking and, over the years, I have sought to continually improve my skills. When dealing with a complex subject, my goal is to communicate it in a manner that is easily understandable and interesting.

- Taught Global Webinar for the Conscious Business Initiative; topic: “Business Integrity and Financial Transparency” June 2016 and November 2016.
<http://www.humanitysteam.org/cb-training>.
- Numerous project presentations as a student in the Ph.D. in Management and Executive MBA Programs (2013-2017 and 2010-2012).
- Guest Speaker at Rotary Club of South Gwinnett and Rotary Club of Griffin (2012).
- Taught various internal training courses throughout my professional career at Windham Brannon and Coopers & Lybrand.
- Guest Speaker for Georgia Society of CPAs and Texas Society of CPAs financial institutions CPE courses (1985 and 1984).
- Graduate of Speakeasy professional speaking program (1982).

PROFESSIONAL EXPERIENCE

WINDHAM BRANNON, P.C., CERTIFIED PUBLIC ACCOUNTANTS ATLANTA, GA

July 1988-Present

- Principal and Shareholder (1989-2016; retired from the Firm as of January 1, 2017)
- Principal (1988)

Synopsis: Joined Windham Brannon as a non-owner Principal in 1988, and elected a Shareholder in 1989. At that time, Windham Brannon employed approximately 40 personnel. Today, Windham Brannon employs 170 professional and administrative staff, and the Firm is one of the largest non-national CPA firms in Georgia.

Client Service: Served clients in the following industries: Manufacturing, Professional and Other Services, Real Estate, Family Partnerships, Technology, and Private Equity. Business clients included S-corporations, Partnerships, LLCs and C-corporations. Considerable work with High Net Worth Individuals (primarily income tax and advisory services). Advised clients and legal counsel in structuring a number of mergers & acquisitions, both buy-side and sell-side.

Served as a member of the Firm’s Litigation Services Team, which included providing financial analysis and giving sworn testimony in county, state and federal courts and before the U.S. Department of Justice.

Business Development: A significant area of focus was in new business development. Many of the Firm's most significant clients were obtained by my business development efforts during the past 28 years. I enjoy meeting people and building new, long-lasting relationships.

DAYS INNS OF AMERICA, INC.**ATLANTA, GA**

April 1985-July 1988

- Vice President of Corporate Tax; Assistant Treasurer (1987-1988)
- Vice President of Accounting and Tax (1986)
- Director of Corporate Tax (1985)

Synopsis: Recruited by an executive search firm, Spencer Stuart & Associates, to join Days Inns as Director of Corporate Tax; promoted to Vice President the following year. Days Inns recently (1984) had been purchased by Reliance Capital Group, a Private Equity Group headquartered in New York, in a 'friendly' junk bond-financed leveraged buyout from the Day family. Days Inns had multiple operating subsidiaries engaged in hotel franchising, construction, ownership, management, and real estate development. Responsible for building and leading an internal tax department of seven individuals; we handled all corporate and partnership tax planning and tax return preparation matters, many of which were complex due to the corporate acquisition structure together with the continual rounds of public debt and equity financing. In the span of four years Days Inns transitioned from being purchased in the LBO, to going public in an IPO, to going private again. Once Days Inns went private, I decided to re-enter public accounting in a smaller and more entrepreneurial environment. Ultimately, I joined Windham Brannon.

COOPERS & LYBRAND, CERTIFIED PUBLIC ACCOUNTANTS**ATLANTA, GA****(merged with Price Waterhouse in 1998 to form PricewaterhouseCoopers)**

June 1978-March 1985

- Tax Manager (1982-1985)
- Tax Supervisor (1981)
- Tax Staff (1980)
- Audit Staff (1978-1979)

Synopsis: Commenced public accounting career in the Audit Department; after 15 months I transferred into the Tax Department and began working on my Master of Taxation studies at Georgia State University. At C&L I worked primarily in the areas of business and individual taxation. My business client focus areas included Manufacturing/Distribution, Real Estate, Insurance, Pharmaceuticals, Financial Institutions, and Business Services.

PROFESSIONAL CERTIFICATIONS**Chartered Mergers and Acquisitions Professional (CMAP)**

National Association of Chartered Valuators and Analysts (NACVA); Certificate awarded October 2012

Certified Public Accountant

State of Georgia

Certificate # 5079 awarded July 22, 1980

Passed the CPA examination in first attempt, November 1978

PROFESSIONAL ORGANIZATIONS

- American Institute of Certified Public Accountants
 - Georgia Society of CPAs
 - American Accounting Association
 - Academy of Management
 - Atlanta Estate Planning Council, Atlanta, GA, a Georgia professional organization dedicated to providing education and fellowship for CPAs, attorneys, and financial advisors in all areas of estate planning.
 - Atlanta Tax Forum, Atlanta, GA, a Georgia professional organization dedicated to furthering the education of CPAs and attorneys in all areas of federal and state taxation.
 - The Explorers Club, New York, NY, an international professional organization dedicated to exploration and field science.
 - Green Chamber of the South, Atlanta, GA, a Georgia professional organization dedicated to the philosophy that developing a sustainable business strategy makes good sense for the corporate bottom line and the community at large.
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COMMUNITY SERVICE AND LEADERSHIP

- Rotary International, Rotary Club of Buckhead—Member of International Service and New Member Recruitment Committees (2012-2017).
 - Star*C Corporation, Atlanta, GA, whose mission is to assist economically disadvantaged residents in overcoming problems associated with community decline—Member of the Board of Directors (2013-present).
 - The Urban League of Greater Atlanta—Chairman of Audit Committee; Member of Executive Committee and Board; Member of Nominating Committee (2011-2014).
 - High Museum of Art, Atlanta, GA—Chairman of Finance Committee; Treasurer; Member of Executive Committee and Board of Directors (1991-1997; 1998-2004; 2005-2011).
 - Woodruff Arts Center, Atlanta, GA—Member of Finance Committee (1992-1997; 2007-2009).
 - Park Place Homeowner's Association, Atlanta, GA—Member of Executive Committee and Board of Directors; Treasurer; Chairman of Finance Committee (1996-2001); President of the Association (2002-2004).
 - Georgia Shakespeare Festival, Atlanta, GA—Member of Board of Directors; Treasurer; Chairman of Finance Committee (1996-1998).
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