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| **Robert E. Duquette, CPA, MBA****Teaching Full Professor --Lehigh University****Ret. Sr. Ptr. , Ernst & Young LLP (EY) Dir. of M&A Tax Philadelphia** **Cell: 215-275-0189****red209@lehigh.edu** |
|  | Employment* Lehigh University: Teaching Full Professor Fall 2022 to Present; Professor of Practice Fall 2016-Spring 2022; Lecturer Fall 2009 – Spring 2016. Courses: Financial Reporting for Managers and Investors (MBA program), Introduction to Financial Accounting & Introduction to Managerial Accounting; Financial Reporting and Managerial Accounting for Decision Making (Masters in Management Program); Intermediate Accounting; Fundamentals of Federal Income Taxation; Taxes and Business Strategies; Advanced Federal Income Taxation (Masters in Accounting Program)
* *Awards:* *College of Business Robert & Christine Staub Faculty Excellence Award 2022-2023; Graduate Faculty Excellence in Teaching Award” 2021-2022 MS in Management Program; Graduate Faculty Excellence in Teaching Award; ” 2020-2021 MS in Management Program; College of Business Undergraduate Excellence in Teaching Award” 2019-20; and Graduate Faculty Excellence in Teaching Award” 2018-2019 MS in Management Program*
* Kutztown University Full Time and Instructor Fall 2013- Spring 2016: Auditing, Financial Accounting and Intermediate Accounting
* Part time consulting to local, regional, and national CPA and law firms as needed 2009-2020: Griffin/Stevens & Lee Tax Consulting Network; Of-Counsel William Koch & Associates
* Ernst & Young LLP (EY) 1981—2009: Senior Partner and Practice Leader Philadelphia Area Transactions Tax Group: 2002 until retirement in 2009: Responsible for the overall quality control of the advice, preparation and review of all significant tax opinions, the coordination of all client tax services, deal structuring, review of all deal related agreements, due diligence of target company tax history and disclosures, and the coordination with financial and legal due diligence teams. Advised on over 500 corporate transactions, both domestic and cross border, aggregating over $50 billion in volume for publicly held and middle market companies.
* **Managing Tax Partner, Central Pennsylvania Office:**

1990 – 2002 (Consistent No. 1 Ranking in East Region Performance) Education, Honors, and Professional Certifications* **M.B.A. (Accounting & Finance concentration, 1976) and a B.A. (Economics, 1975) both from University of Maine at Orono , with Highest Distinction and High Honors; Phi Beta Kappa, Beta Gamma Sigma, and Phi Kappa Phi**
* **CPA since 1977, and renewed biannually**
* **Graduate of EY’s Accelerated Tax Training National Tax Office Program in Washington DC:** 1985 -1986 (highest ranked) graduate in immersive and intensive 1000 hour formal classroom and tax research training program equivalent to Masters in Tax study program

Experienced Public Speaker * **PICPA Federal Tax Committee representative to speak on “ Tax Reform and Its Results; and the National Debt and its Implications***”*. Presented to various professional regional groups periodically throughout the past 30 years, including various PICPA chapters & Bar Associations Annual Tax Forums, and select private company executive audiences
* Ernst & Young University (EYU) Tax Law Instructor 2002-2009

Published Articles & Presentations as Invited Speaker * **Author**: **Ask the Experts**--“**How is Tax Day 2024 different from Past Years?”;** Wallet Hub**;** March, 2024**;** <https://wallethub.com/blog/tax-day-facts/11835>
* **Author: “What To Expect on the Federal Tax Front This Election Year” ;**  Pennsylvania CPA Journal; Spring 2024; <https://lnkd.in/gf2ekKi8>
* **Author: “A Lot of Spending, Huge Debt: Something Has to Give”;**  Pennsylvania CPA Journal; Winter 2024; <https://lnkd.in/eKYij6_T>
* **Co-author: "A Roadmap to the New CPA Exam";** Pennsylvania CPA Journal; Summer 2023”;[**https://www.picpa.org/keep-informed/pennsylvania-cpa-journal/journal-editions/summer-2023/article/2023/06/16/a-roadmap-to-the-new-cpa-exam**](https://www.picpa.org/keep-informed/pennsylvania-cpa-journal/journal-editions/summer-2023/article/2023/06/16/a-roadmap-to-the-new-cpa-exam)
* **Author: “The Inflation Reduction Act of 2022 and the Corporate Alternative Minimum Tax**”; September 26, 2022; <https://www.picpa.org/articles/cpa-now-blog/cpa-now/2022/09/26/inflation-reduction-act-and-corporate-alternative-minimum-tax>
* **Co-author:** [**“The New & Improved CPA Exam: A Look Inside the CPA Evolution Updates”**](https://mydigitalpublication.com/publication/?i=730019)**;** Pennsylvania CPA Journal;Winter 2022;

https://mydigitalpublication.com/publication/?m=14667&i=730019&p=22&ver=html5* **Author: “**[**Get to Know the Family-Related Tax Provisions in the Coronavirus Relief Plan**](https://www.picpa.org/articles/cpa-now-blog/cpa-now/2021/03/23/family-related-tax-provisions-in-the-american-rescue-plan)**”**; Mar. 23, 2021; <https://www.picpa.org/articles/cpa-now-blog/cpa-now/2021/03/23/family-related-tax-provisions-in-the-american-rescue-plan>
* **Presentation as Invited Speaker: “Tax Policy & the National Debt”;** 2020 PICPA Tax Conference; Jan. 15th, 2021
* **Author: “**[**Election 2020: Comparing the Candidates’ Tax and Economic Visions**](https://www.picpa.org/articles/cpa-now-blog/cpa-now/2021/03/23/family-related-tax-provisions-in-the-american-rescue-plan)”, Sept. 29, 2020; <https://www.picpa.org/articles/cpa-now-blog/cpa-now/2020/09/29/comparing-2020-candidates-economic-visions>
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* **Author: “**[**What You Need to Know Before You File Your 2019 Tax Return**](https://medium.com/illuminate-the-lehigh-business-blog/what-you-need-to-know-to-file-your-2019-tax-returns-1a91b012e6b7)”; Il*luminate: The Lehigh University Business Blog*; Jan. 20, 2020; <https://medium.com/illuminate-the-lehigh-business-blog/what-you-need-to-know-to-file-your-2019-tax-returns-1a91b012e6b7>
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* **Author: *“***[**Tax Reform in the Next 100 Days: Can It Be That Close?*”***](https://www.picpa.org/articles/cpa-now-blog/cpa-now/2017/01/23/tax-reform-in-the-next-100-days-can-it-be-that-close) *PICPA podcast* Jan. 2017; <https://www.picpa.org/articles/cpa-now-blog/cpa-now/2017/01/23/tax-reform-in-the-next-100-days-can-it-be-that-close>
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Review Acknowledgements* ***Corporate Tax Aggressiveness – Recent History and Policy Options; by* Prof. Richard (Dick) Harvey, Jr., Villanova University, in National Tax Journal, November 2014**

Various textbook editions of Federal Taxation and Taxation of Individuals and Business Entities, by Spilker et.al. McGraw Hill, including 2022 through 2024. Professional Affiliations* American Institute of Certified Public Accountants: Active CPA member since 1977, including former *National Council Board Member 1996 – 1998*.
* Pennsylvania Institute of Certified Public Accountants: Active current member of the *Pennsylvania CPA Journal Editorial Board;* *Federal Taxation Committee* and *co-chair of subcommittees* dealing with the federal budget and tax reform initiatives; active member and past chair of *Berks County Federal Tax Committee.*
* Institute of Management Accounting: Member 1976-1997 including former President of Berks County Chapter, past member of its Mid-Atlantic Council, and past National Director 1991-1993
* Berks County Chamber of Commerce: Prior member of Board of Directors 1994-1997 and former chair of the Tax Committee

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