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EDUCATION/CERTIFICATION

- Certified Public Accountant (NC License #36733) (March 2012)
- Master of Accounting and Information Systems, Virginia Tech (May 2010)
- B.S. (in Honors) in Accounting and Information Systems, Summa Cum Laude, Virginia Tech (May 2009)

PROFESSIONAL AND BUSINESS EXPERIENCE

Assistant Professor of Practice – Accounting and Information Systems, Virginia Tech, Blacksburg, VA (August 2016 – Present)

- Courses taught:
 - ACIS 3115 – Intermediate Financial Accounting Part I
 - ACIS 3116 – Intermediate Financial Accounting Part II
 - ACIS 3504 – Accounting Systems and Controls
 - ACIS 4654 – Accounting Analytics / ACIS 5654 – Advanced Accounting Analytics
 - Created and developed this course as well as taught it ever semester since its inception. The course ensures that students grasp the methodologies of data analytics including a tool agnostic critical thinking mindset. The course places an emphasis on large data and how to approach analysis in methodologies that include both traditional and emerging technologies to produce action-oriented solutions. This includes cleaning data sets, summarizing and profiling the data, creating exploratory and declarative visualizations, and verbal and written communications.
 - Worked directly with Deloitte to present how their Advisory and Consulting practices utilize Tableau and other data analytics software to conduct client work. This included a hands-on in class demonstration as well as a follow up discussion on how the industry is changing with technology and big data as influencers
 - Worked directly with Kearney & Company to present in class on data analytics, robotic process automation, system implementations, blockchain, and data visualization
 - ACIS 5984 - Business Analytics & Visualization for Executives
 - Created, developed, and taught this special study course for the Executive MBA program
 - Coordinated directly with the EMBA program administration to develop this course to ensure the material was relevant and robust as it pertains to the needs of executives.
 - Course focused on the theory and implementation of data analytics methodologies and techniques including but not limited to data cleaning, data summarization, regression, classification, cluster analysis, and data visualization.
 - The course reinforced technology through the use of various software products including Microsoft Excel, Alteryx, Microsoft Power BI, Tableau, and an introduction to Robotic Process Automation
 - Data Handling and Visualization for Business – SVKM’S NMIMS Data Science University in Mumbai, India
 - Created, developed, and taught a full 40-hour course through Virginia Tech outreach for the NMIMS University in Mumbai, India
 - Coordinated with professors at NMIMS to determine the needs of the students and the outline for the course
 - Course focused on data cleaning and data visualization including theory and design
 - Microsoft Excel, Microsoft Power BI, Alteryx, and Tableau were all taught to reinforce learning

Outreach and International Affairs – United States Navy Teaching

- On two separate occasions, I developed and delivered an 8-hour data analytics training program to the Mid-Atlantic Regional Maintenance Center (MARMC) arm of the Navy which included ship repairmen, naval officers, and administrative staff
- Training was aimed to demonstrate how data analytics can help streamline ship repair for the Navy to ensure timely repair of vital ships
- Training provided in depth analysis of summary statistics, classification, clustering, logistics regression, single and multi-variable regression, data cleaning techniques and machine learning providing both theoretical discussion and hands on demonstrations
- Emphasis was placed on hands-on practical treatment of data analysis and visualization methodologies to train attendees to use these methodologies in the field

Outreach and International Affairs – Virginia Tech India – Department of Defense

- Developed and taught an 8-hour data analytics and training program to federal contractors working with the Department of Defense
- Provided a 90-minute data management session to executive leaders
- Provided input on how data governance and management can be achieved at all levels of an organization with emphasis on data integrity and presentation

Outreach and International Affairs – Virginia Tech India – Analytics Certification (Delivered three times)

- Developed and taught 4 hours of a 12-hour data analytics certificate offered through VT outreach
- Course focused on the aspects of data cleaning, analytics, visualizations, and ethics

Outreach and International Affairs – Virginia Tech India – Data Science and AI Applications in Industry Executives Panel

- Served as a panel member to provide guidance and information on the impact and applications of data science and artificial intelligence in the financial world including impacts on ethics, product development, product delivery and information consumption

GBAC Lunch and Learn Series

- Was the presenter and speaker for two lunch and learn series with the Pamplin College of Business Dean Robert Sumichrast and Partners from EY and PwC
- Presented about the use of data analytics in the classroom including current and planned efforts

Accounting and Auditing Conference (Fall 2019)

- Developed and delivered five 2-hour CPE presentations on the use of analytics in accounting over three locations during the VSCPA Accounting and Auditing conference (2 sessions in Roanoke, VA, 2 sessions in Falls Church, VA and 1 session in Virginia Beach, VA. These were delivered in direct support of Certified Public Accountants across the entire state of Virginia to promote the use of analytics in the public, private, and governmental sectors.
- Developed and delivered a 4-hour plenary session presented live in Virginia Beach, VA and via a live webcast to approximately 400 professionals. This involved a deep dive on how tools such as Excel, Alteryx, Tableau, and Automation Anywhere could be leveraged in a professional environment to provide efficient and effective analytics to improve decision making and accuracy.

PwC Automation and Analytics Academy (3/7/19-3/8/19)

- Attended a two-day Automation and Analytics Academy presented by PwC. The academy was a hands-on look at how emerging self-service tools can help address the challenges of ongoing impact modeling and adjusting reporting processes to benefit from opportunities in automation. The Conference was demonstrated by PwC's Tax Reporting & Strategy (TRS) and Advanced Tax Analytics and Innovation (ATAI) practices.

- The conference covered the use of Alteryx, Tableau, and various robotic process automation software with real world examples of implementation from their digital accelerators

AAA – Intensive Data and Analytics Summer Workshop (Summer 2018 and Summer 2019)

- Attended 80+ CPE hours of data and analytics training through the American Accounting Association at the 2018 and the 2019 Intensive Data and Analytics Summer Workshop
- Training included in depth learning of big data analytic and automation tools such as Alteryx, Tableau, Power BI, Automation Anywhere, and other emerging technologies
- Training was delivered by both faculty and professionals including big four and regional accounting partners as well as professionals in the technology field

KPMG Master of Accounting with Data and Analytics Working Session (6/8/18)

- Worked with KPMG professionals and other collegiate faculty in a KPMG working session concerning updates and modifications to the Master of Accounting with Data and Analytics program and the implications on other emerging technologies in the field

KPMG Master of Accounting with Data and Analytics Faculty Training (1/4/18 – 1/6/18)

- Attended a multi-day training that covered KPMG proprietary software to be incorporated within the ACIS Master of Accountancy program. This included learning their software and methodologies in addition to learning greater details around their cloud environment and audit approaches
- Worked directly with incoming Virginia Tech MADA students through a 2-hour breakout session to ensure they were comfortable with the Virginia Tech ACIS Master’s Program Curricula and the Blacksburg, VA Community

Virginia Tech Committees

- Pamplin College of Business Online Learning Task Force Member (04-16-2020 - 05-06-2020)
 - Member of the Online Learning Taskforce lead by Associate Dean Kevin Carlson (Spring 2020)
 - Worked to develop a quick and effect strategy for online teaching due to the Covid-19 pandemic
 - Surveyed ACIS students and presented results to the taskforce including recommendations on how to address student concerns an implement non-traditional learning methodologies.
- Chair of the Scholarship Committee (Accounting and Information Systems Department)
 - Review of scholarship applications and distribution of scholarships totaling in excess of \$350,000 to approximately 100 students annually in conjunction with the Scholarship Committee
 - Scholarship promotion through beginning of year meetings and applicable accounting groups on campus
- Chair of the ACIS Department Marketing and Promotion Committee
 - Coordinate the development and distribution of the annual ACIS newsletter to alumni
 - Coordinate recruitment and outreach efforts including local area high school recruitment, major fairs, and open houses for new and transfer students
- Member of the Masters of Accounting and Information Systems Committee (19/20)
 - Aid in the checklist and curriculum changes in the MACIS program
- Member of the KPMG Data Analytics Process
 - Attended various trainings to become acquainted with the KPMG audit methodology and proprietary software to utilize in the classroom
- Member of the AACSB and AOL Committee (Accounting and Information Systems Department)
 - Aided with AOL verbal and written assessments, modification of the ACIS AOL assessment, and the proctoring of the ETS assessments
 - Participated in the AACSB process including acting as a representative for ACIS for AOL and Instructor reviews

- Member of the Academic Programs Committee (Accounting and Information Systems Department)
 - Assisted with updating the Undergraduate ACIS checklist to ensure it consistently reflects curriculum changes. Performed a reconciliation between the undergraduate and graduate catalog to the 2018 modified ACIS curriculum for consistency between listings, pre-requisites, and co-requisites. Provided a roadmap between the previous and modified ACIS curriculum to determine what actions to take in various scenarios with continued advisement to the Pamplin academic advising team on these matters.
 - Aided in the development of undergraduate curriculum requirements and acts as a liaison with academic advising
- Faculty Advisor – Beta Alpha Psi
 - Worked directly the Beta Alpha Psi officers and the Big Four accounting firms, regional accounting firms and corporate institutions to ensure continued partnership, recruiting and development of Pamplin students
 - Presented alongside professionals and students as part of a professionals panel discussion to drive interest in business and Beta Alpha Psi
 - Provided an hour-long demonstration of Tableau to the Virginia Tech Beta Alpha Psi Chapter to provide insight on the impact of data visualization analytics on decision making
 - Developed Canvas site for Beta Alpha Psi officer team to track dues and attendance
 - Advise Beta Alpha Psi members on policies, procedures, and best practices
- Faculty Liaison – Emerging Leaders Board
 - Work directly with Virginia Tech ACIS alumni who are currently professionals to ensure our curriculum, methodologies and approach are in line with emerging trends in the profession
 - Attend Emerging Leaders Board meetings and provide feedback from a faculty standpoint
 - Utilize role to assist in curriculum and marketing committees to ensure our program is meeting the needs of the workforce on a continuing basis
- Faculty Liaison – ACIS Board of Advisors
 - Worked with other faculty to present and explain curriculum modifications with the ACIS Board of Advisors to ensure curriculum changes and technology approaches are in line with professional expectations
 - Provided a detailed explanation to a sub-committee of the ACIS Board of Advisors on the creation and implementation of the new Accounting Analytics course
- Member of a Committee to determine the feasibility of a 4-year Masters/Bachelors program (Accounting and Information Systems Department)
- MATH 1524 (Math for Business Majors) Development (Member) - ACIS Department representative tasked with assisting in the development of the new MATH 1524 course. Created three Accounting specific math labs for the course.

Scholarly Publications – AAA 2019 TLC Midyear Colloquium – Teaching Roundtable Sessions

- Easterwood, C., & Shortt, J. (2019). The Key Performance Indicator Case and Other Ideas for Developing Critical Thinking and Communications Skills in a Data Analytics Course.

Content Developer – Becker CPA Review (Remote)

- Wrote seven chapters for the Becker CPA Review Guide for the Business Environments and Concepts portion of the CPA exam. This entailed enhancing the material to be more data, analytics, and visualization focused. This totaled approximately 100 pages of content, creating practices multiple choice questions, simulation-based questions, and other study materials.
- Wrote one new chapter concerning Audit Data Analytics for the Becker CPA Review Guide for the Auditing portion of the CPA exam. This chapter was brand new and focused on the use of analytics and visualizations during the course of an audit.
- Developed Excel Analytics Simulations for the Becker materials concerning Auditing section of the CPA exam
- Developed Multiple Choice questions for the Becker materials concerning the Business Environments and Concepts section of the CPA exam with a focus on data analytics

Chair - Data Analytics Advisory Board – McGraw-Hill (Remote)

- Chair of McGraw-Hill's Data Analytics Advisory Board which includes accounting faculty from across the country and professionals (KPMG Director of Audit Data Analytics and a Senior Tax Director). The board advises McGraw-Hill development and editors on analytics matters as it pertains to their published and potential accounting textbooks and digital materials
- Delivered webinars for accounting professors looking to use accounting analytics in the classroom
- Reviewed existing analytical exercises in various software platforms for accuracy and effectiveness in convey analytical subject matter
- Created step by step walk throughs to show how to apply various analytics in Microsoft Excel

Digital Faculty Consultant – McGraw-Hill (Remote)

- Created accounting analytics exercises for one of the most widely adopted Managerial Accounting textbooks. Exercises included various Microsoft Excel analytic techniques and applications as well as the creation of Tableau interactive dashboards for student use.
- Created application-based Tableau and Microsoft Power BI exercises for one of the most widely adopted Managerial Accounting textbooks including training guides and videos
- Created Excel Modules including video documentation of how to apply various Microsoft Excel formulas, functions, and advanced capabilities
- Created and reviewed digital content for the Intermediate Financial Accounting textbook including preparation of core and accessible PowerPoint lecture slides and review of digital homework and test banks for accuracy and clarity
- Delivered 4 hours of in person training to Accounting faculty from universities across the country on how to utilize analytics to further financial and managerial accounting in the classroom

Vice President – Manager Finance, Bank of America, Charlotte, NC (June 2014 – July 2016)

- Managed a regulatory transaction review and escalation process and was designated as a regulatory subject matter expert. This included running a daily call with Finance, Regulatory Legal, and Compliance to decision complex transactions and interpret regulatory inquiries. This responsibility included documenting and communicating all guidance and escalating to senior management as required.
- Responsible for developing presentations for Bank of America leadership, the Federal Reserve Board, and the Office of the Comptroller of the Currency
- Worked with senior management to lead efforts to implement a Quality Assurance program across the enterprise. This included developing process maps, identifying key controls, and developing a sustainable metric reporting process.
- Worked with senior management to develop an enterprise wide legal entity booking strategy to ensure inherent risk, business rationale, and the control environment were appropriate for product offerings with regulatory impacts.
- Developed a sustainability model to ensure ongoing regulatory compliance by implementing controls into new product efforts to allow for escalation and review prior to a new products launch.

Risk Advisory Lead Consultant, Dixon Hughes Goodman, Charlotte, NC (April 2013 – June 2014)

- Lead consulting team remediating FRB identified issues. This effort required creating and rolling out a gap assessment to determine existing gaps for all lines of business and control functions within the enterprise. This required leading meetings with top management to ensure efforts were on track and documented appropriately.
- Lead efforts to gain data provider procedures for regulatory reporting. This included meeting with senior leaders and obtaining/assisting in development of approximately 400 sets of desk level procedures.
- Developed a comprehensive Regulation W training program and delivered the training to approximately 1000 internal audit associates (inclusive of the chief auditor) at a Fortune 25 company. The training was a global exercise with 25 sessions and was done in person, via web, and through recorded sessions.
- Developed and delivered internal firm training for Dixon Hughes Goodman.

Manager Financial Services – Cash Management, Carolinas Healthcare System, Charlotte, NC (August 2012 – April 2013)

- Management of daily cash activities, including managing the daily cash position, approving Wires, ACH's, and disbursement requests, and reviewing daily journal entries. Responsible for bank account relationships and oversight, including analysis of monthly bank fees and regional bank transfers. Responsible for change fund and petty cash fund management and general cash management policy inquiries.
- Management oversight of multi-billion-dollar funded depreciation account. Including monthly reconciliations, and consolidated quarterly and annual reporting. Preparation and review of annual funded depreciation financial statement reporting including footnote disclosures and preparation in correspondence with GASB 40 and GASB 31 requirements. Responsible for yearend audit requests, including investment manager confirmations, fixed income duration calculations/ratings, and investment manager classifications.
- Daily, monthly, and quarterly cash forecast preparation and actualization.
- Chair of Payment Card Industry (PCI) Data Security Standard Compliance Initiative.
- Local Government Commission (LGC) 203 Reporting.
- Review of various GL Account reconciliations and Hospital reconciliations.

Risk Advisory Consultant, Dixon Hughes Goodman, Charlotte, NC (December 2011 – August 2012)

- Performed retrospective international consolidation accounting for a Fortune 25 Company. Included application of US GAAP consolidation procedures over a multitude of entities with locations in the Americas, Europe, and Asia over a retrospective accounting period of 2 years. Investigated and resolved any variances from US GAAP.
- Advised and consulted with both domestic and international controllers to ensure appropriate accounting methods were utilized in a variety of situations including creation of new companies, selling of companies (both internally and externally), deconsolidation, restructuring, capital injections, and dividends.
- Created, Tracked, Reviewed, Uploaded, and posted Journal entries during the consolidation analysis process.
- Supervised team members and tracked progress of a variety of projects including reconciliation of balances between system test environments and ensured company analyses were ready for controller and regulatory review.

Assurance Experienced Associate, PricewaterhouseCoopers, Charlotte, NC (August 2010-November 2011)

- Developed testing strategies to address financial statement and control risks in all areas of the accounting cycle. This included audit techniques such as walkthroughs, inquiry, substantive testing, analytics, controls testing, and observation to ensure compliance with the appropriate regulations (GAAP focus).
- Performed audit work over a varied clientele in industries including industrial manufacturing, telecommunication services, consumer products, and energy solutions. This clientele included companies that do business internationally, nationally, and locally and range in size from the large public companies to small private companies.
- Extensive experience with the Cash cycle through audit work performed including cash confirmations, bank reconciliations, cash flow analyses, year over year/quarter over quarter analytics, narrative walkthroughs, and controls testing.
- Analyzed data via procedures utilizing current economic trends, forecasts, and industry/client specific information such as market share and risks.
- Developed process narratives via client interviews, research, and reperformance.
- Helped facilitate client engagement work via coordination of the client's internal audit, PwC information technology auditors, client management, external and internal specialists, and other PwC team members.

Audit Intern, PricewaterhouseCoopers, Tysons, VA (June 2009 - August 2009)

- Performed trend and ratio analysis quarter over quarter and year over year for specific account balances and gained an understanding of the relationships evidenced via substantive testing and client inquiry.
- Performed testing over the client's expense practices ensuring compliance with policies and procedures via inspection of corporate records and discussion with the client.
- Performed substantive testing over foreign currency translation to ensure client records were recorded correctly and translation gains/losses were reasonable.

Internal Audit Intern, Wachovia, Charlotte, NC (June 2008-August 2008)

- Performed analysis over 3rd party vendors to ensure their financial strength and risks were reasonable to continue utilizing them for services and products.
- Coordinated and developed testing over outsourced services employed by the corporation, to ensure the reasonableness and reliability of the services provided.
- Performed walkthroughs of business processes to develop narratives to ensure they followed policies and procedures and external authorities.
- Reviewed legal contracts with 3rd party vendors to ensure they complied with recently passed legislature

Audit Intern, McLeod & Co, CPA, Roanoke, VA (January 2008-May 2008)

- Performed three-way reconciliations between bank statements, government records, and banner software to ensure appropriateness of a university's Banner scholarship system.
- Developed flow charts and narratives of system and business processes through inquiry with the client and walkthroughs.
- Developed business processes for a new client system implementation including new reports and formats for system outputs.

TECHNOLOGY CAPABILITIES

Hardware, Software, & Operating Systems

- Proficient in:
 - Microsoft Office Suite, including Access, Word, Excel, PowerPoint, Outlook and Visio
 - Microsoft Power BI
 - Tableau
 - IDEA
 - Alteryx
 - Automation Anywhere (RPA)
 - Intuit QuickBooks (Desktop and Cloud-based)
 - Oracle
 - Blueprint
- Acquainted with R, Python, SAP, and ACL

METHODOLOGIES

- Subject matter expert on Sections 23A and 23B of the Federal Reserve Act (Regulation W)
- Proficient understanding of data analytics methodologies and application
- Proficient understanding of data visualizations
- Understanding and application of the Sarbanes-Oxley Act of 2002 and Public Company Accounting Oversight Board (PCAOB) Standards.
- Understanding and application of Generally Accepted Accounting Principles (US GAAP)
- Understanding and application of Generally Accepted Auditing Standards (GAAS)
- Understanding of the Volcker Rule under Dodd Frank
- Understanding of activities at large banking/financial and healthcare institutions

HONORS

- Pamplin 2019 Certificate of Teaching Excellence (ACIS, Virginia Tech)

MEMBERSHIPS

- Member of the American Accounting Association