Curriculum Vita

Charles J. Russo, PhD, CPA, CMA, CVA
Business Valuations, Litigation Support, Taxation
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Dr. Charles J. Russo provides business valuation and litigation support services for closely held and mid-market companies along the east coast. He provides expert witness services as a consulting expert or testifying expert. His areas of expertise include business valuation, litigation support, financial accounting, management accounting, and federal taxation. His 30-year career has encompassed successful positions in both academia and professional practice.

Client engagements have spanned multiple industries including professional practices, manufacturing, real estate partnerships, construction contractors, military consulting firms, retail, insurance agencies, medical urgent care facilities, IT consulting firms, scientific R&D medical, online education, and pharmacies.

He worked with KPMG early in his career, and later as a large firm Senior Tax Manager working with offices in Pennsylvania, New Jersey, and Delaware where he managed a list of clients, provided firm-wide tax research, developed firm tax policies and procedures, and served as coordinator of tax training and education. He has served clients in manufacturing, retail, professional practices, construction, IT consulting, broadcast radio, electrical power trading, gas leasing, and non-profit entities.

He has published journal articles in academic and professional journals, presented at conferences and has taught seminars for various professional groups across the United States. He served as an instructor for interactive panel discussions in business valuation at the 100th American Accounting Association National Conference in New York. Topics included valuation standards, the income, asset, and market approaches, premiums, discounts, and pass-through entities.

Dr. Russo is a tenured Associate Professor of Accounting at a large university where he teaches advanced financial accounting, management accounting, and graduate taxation of corporations, partnerships, estates, and trusts. He previously served as Associate Professor of Accounting and Taxation at Bloomsburg University of Pennsylvania, and as Associate Professor and Department Chair of Accounting at Penn State University/Pennsylvania College of Technology.

EDUCATION AND CERTIFICATIONS

Education

- PhD — Human Resource Development — The Pennsylvania State University — 2002
  Dissertation: *Academic and Demographic Factors Related to Success on the CPA Exam*
- MBA — Business Administration — Nova University — 1991
- BS — Accounting — The Florida State University — 1983

Certifications

- CPA — Certified Public Accountant — 1987
- CMA — Certified Management Accountant — 1995
- CVA — Certified Valuation Analyst — 2010

Professional Experience

Principal - Charles J. Russo, PhD, CPA 2009-present

- Business Valuation and Litigation Support Services for closely-held and mid-market companies.
- He provides expert testimony as a consulting expert or as a testifying expert.
- Business litigation, equitable distribution, shareholder disputes, purchase/sale, estate/gift taxation, lost profits, damages.

Senior Tax Manager– Parente Randolph, LLC 2005 – 2009

- National Top-25 consulting firm with 20 offices and 1,100 professionals
- LEAP Partner Track Leadership Program 2007-2009
- Senior Tax Manager designated as *"firm-wide"* and served multiple offices in Pennsylvania, New Jersey, and Delaware.
- Managed a book of business; tax research for multiple offices; special projects, serve on firm best practices committee; coordinate firm-wide tax staff training from entry level professionals through management.
- Industries included manufacturing, broadcast radio and entertainment, physician practices, non-profit entities, electrical power trading, natural gas, and software development.

Senior Tax Consultant, Biscotti Grassi & Co., CPA's 1989-1991

- New York based regional firm of 100 staff.
- C-Corporations, S-Corporations, Partnerships, LLCs, Non-Profits, Individuals, Multistate taxation
- Manage a book of business
- Tax compliance and research.
- Instructor of in-house staff training for taxation of corporations, partnerships, and individuals.
- Industries: Construction, real estate, professional practices, manufacturing.

Senior Tax Specialist KPMG, Fort Lauderdale, FL 1988 – 1989

- Federal taxation of corporations, partnerships, LLCs, non-profits, and individuals
- Multistate taxation.
- Tax research.
- Supervise staff accountants.
- Industries: Construction, professional practices, hospitality.

Tax Accountant Burnup & Sims, Inc. Fort Lauderdale, FL 1985 – 1988

- Federal taxation for various components of the consolidated federal return at the corporate headquarters for a NASDAQ traded company with 30 subsidiaries operating in 40 states.
- Tax research and planning. Work with tax director, attorneys, and IRS on Large Case Audits
- Industry: Telecommunications construction

Academic Experience

Associate Professor of Accounting 2009 – Present
Towson University
Towson, Maryland
http://fusion.towson.edu/www/cbe/DigitalMeasures/faculty_profile_main.cfm?FacMem=crusso

Teaching

- Advanced Accounting
- Graduate Taxation of Corporations, Partnerships, Estates and Trusts
- Management Accounting
- New Courses Developed
    - ACCT 721 Financial Statement Analytics and Valuation.
    - ACCT 410 Governmental & Not-for-Profit Accounting.

Research

- Federal Taxation, Business Valuation, Forensic Accounting
- See intellectual contributions below.

Service

- Assistant Chair – Department of Accounting 2015-2016
- Department of Accounting Curriculum Committee 2009-present
    - Chair: Department of Accounting Curriculum Committee 2013, 2015-present
    - Curriculum Revisions
        - BS-Accounting 2016
        - MS Accounting 2016-2017
- Department of Accounting Faculty Search Committee 2014-present
- Department of Accounting AACSB Assessment Committee, 2013
- Department of Accounting AACSB Assurance of Learning Committee 2010-2013
- Department of Accounting PTRM Committee 2015- present
- College of Business and Economics Learning Excellence Committee, 2013-present
- College of Business and Economics Council (CBE Senate) 2009-2013, and 2014-2016
    - Secretary: CBE Council, 2009-2011
- Provost's Focus Group for the College of Business and Economics 2010.
- Faculty Adviser Beta Alpha Psi – Iota Zeta Chapter 2009 - 2011
    - Awards from Beta Alpha Psi National include:
    - 2011 Superior Status
    - 2010 Ernst & Young Diversity Award
    - 2010 Superior Status
    - 2010 Significantly Improved Status
- Academic Advising for approximately 30 accounting majors

Associate Professor of Accounting 2003 – 2007
Bloomsburg University of Pennsylvania
Bloomsburg, Pennsylvania

Teaching

- Federal Taxation of Corporations, Partnerships, Estates, Trusts and Gifts
- Graduate Tax Policy
- Graduate Managerial Accounting
- Accounting Information Systems
- Principles of Accounting I

Research

- Federal Taxation, Behavioral Issues in Accounting
- See intellectual contributions below.

Service

- Microsoft 2006 Pinnacle Award for Excellence in Education

  With a team of professors, created a team-taught interdisciplinary course in Supply Chain Management using Microsoft Dynamics Great Plains which won the Microsoft Pinnacle Award for Excellence in Education in 2006. This course, introduced students to the concepts, processes, and strategies of global supply chain management: the integration of business processes from original suppliers through end users. Managing trade-offs in procurement, inventory, and distribution activities, improving forecasts, and developing customer relationships were emphasized. Tracking related transactions and concurrent cash flow implications using enterprise resource planning (ERP) software creates real-world experiences for participating students and demonstrated the value of interactive business information systems. The course included a weekly ERP decision analysis lab. https://news.microsoft.com/2006/03/21/for-outstanding-achievement-by-a-customer-the-winner-is/#sm.0001y8zyjroewe6dv5l1pautsoqw8#ouEhPhZ7ze3cjTh5.97

- ERP Faculty Coordinator 2004-2006:

  Responsible for ERP software implementation for the College of Business using Microsoft Business Solutions Dynamics Enterprise Software. Software applications and modules included: Financial Management, Manufacturing, Distribution, Human Resources Management, Analytics, Project Accounting, Field Service Management, e-commerce, Process Server and System Management. Microsoft donated Microsoft Great Plains Dynamics ERP software to the College of Business.

- University Technology Committee 2005 - 2006
- University Technology Planning Committee 2005 - 2006
- APSCUF Investment Committee 2006-2007
- Notebook University Steering Committee 2006 – 2007
- Communication and Information Technology Committee (CIRC) 2003 – 2007
  - Committee Chair 2005-2006, 2006-2007

Associate Professor of Accounting 1996 - 2003
Department Chair: Accounting 1999-2001
Program Director Financial Planning 1997-2001
SAP Faculty Coordinator 2001-2003
Pennsylvania College of Technology/Penn State University
Williamsport, Pennsylvania

Teaching

- Corporate, Partnership, Estate and Trust Taxation
- Advanced Cost Accounting
- Cost Accounting
- Intermediate Accounting III
- Retirement Planning and Employee Benefits

Department Chair – Accounting 1999 – 2001

- Course scheduling; Curriculum oversight; Evaluation of faculty; Outcomes assessment
- Planning/Meetings and interdepartmental program coordination with Department Chairs, Dean, and Associate Dean for the School of Business and Computer Technologies

Program Director - Financial Planning 1997 – 2002

- Developed 18 credit program and minor in Financial Planning leading to the CFP designation with specific courses including: Fundamentals of Financial Planning; Insurance Planning; Income Taxation of Individuals; Investments; Estate Planning; Retirement Planning and Employee Benefits.
- Accreditation of the CFP Program with the IBCFP in Denver, Colorado 1997 and 2000
- Faculty selection; Curriculum oversight; Course scheduling

SAP Faculty Coordinator 2001 – 2003

- Developed SAP University Alliance proposal for integrating SAP R/3 into the business curriculum.
- Proposal included a multi-year curriculum plan and proposed student outcomes for multiple courses across three academic departments. This multi-year comprehensive project involved several academic departments. SAP donated software to the College worth approximately $200,000.

Curriculum Development - BS Accounting and BS MIS

- Developed the BS in Accounting with accounting department committee. Many courses were resequenced or had significant curriculum changes.
- Developed BS in MIS with interdepartmental committee involving the departments of management, accounting, and computer science.
  - Courses developed or revised by the committee included:
    - Introduction to Management Information Systems; Accounting Information Systems; Database Management Systems; Human Resources Management; Electronic Commerce for Business; Computer Systems Management; Cost Accounting; Business Transaction Systems

Assistant Professor of Accounting 1991 - 1996
Academic Coordinator of Accounting, Economics, and Financial Planning
Barry University, School of Adult and Continuing Education
Miami, Florida

Teaching

- Federal Income Tax I; Intermediate Accounting I; Cost Accounting; Accounting Information Systems; Principles of Accounting I; Principles of Accounting II; Financial Planning; Retirement Planning & Employee Benefits; Health Care Finance; Public Budgeting and Finance; Leadership and Supervision; Organizational Behavior and Management.

Academic Coordinator of Accounting, Economics, and Financial Planning 1993 – 1996

- Division Head coordinating multiple disciplines and multiple campuses across the state of Florida.
- Course scheduling of courses in Accounting, Financial Planning and Economics; curriculum oversight; and selection of faculty for 8 satellite campuses.

Program Director - Financial Planning 1993 – 1996

- Developed 18 credit program in Financial Planning leading to the CFP designation with specific courses including: Fundamentals of Financial Planning; Insurance Planning; Income Taxation of Individuals; Investments; Estate Planning; Retirement Planning and Employee Benefits
- Accreditation of the CFP Program with the IBCFP,1994
- Faculty selection, curriculum oversight, and course scheduling for multiple campuses.

Curriculum Committee: 1993 – 1996

- Worked with the committee in the development and revision of the following degree programs:
  - Bachelor of Science in Public Administration
  - Bachelor of Science in Health Services Administration
  - Bachelor of Science in Financial Planning
  - CFP Certificate Program in Financial Planning
  - Bachelor of Science in General Administration

Faculty Search Committees:

Management	1993
Health Services Administration	1994
Public Administration	1994

Development of Faculty Evaluation System at Barry University 1994

- Developed an integrated system for the evaluation of full time faculty and administrative personnel. - System was developed to weight faculty and administrative responsibilities that varied by each employee contract. Faculty/administrators could demonstrate competence in each category by a variety of accomplishments. Weighted areas were combined to a single composite score. Implemented 1994.

Intellectual Contributions

Journal Publications

1. Russo, C. (2016), *Business Valuation and Allocation of Goodwill for Equitable Distribution*, Baltimore Business Review, January 2017.

2. Martin, Jr. C. L., Russo, C. (2016). *Sherb & Co. LLP: The Master of Botched Audits A Triple Play of Misconduct*, Journal of the International Academy of Case Studies, Submitted November 2015, Revised and Resubmitted, October 2016.

3. Rosenberg, D., Russo, C., Hammer, S. (2015). *The Domestic Production Activities Deduction for the Computer Software Industry*, Journal of Accountancy, AICPA, March 2015.

4. Russo, C., Stone, A., Martin, Jr., C. L. (2014). *Consideration of Fraud in a Financial Statement Audit*, Journal of Forensic and Investigative Accounting, Vol. 6, Issue.2, July-December 2014.

5. Russo, C., Mertins, L., Ray, M. (2013). *Personality Type and Success in the First Managerial Accounting Course*. Journal of Education for Business, 88(4), 2013.

6. Russo, C., Mertins, L., Martin, C. (2013), *A Case of Fraud: Phoenix House*, Journal of Business Industry and Economics, 18, Spring 2013, 87-108

7. Russo, C., Di Gabriele, J. (2012). *Valuing Facebook: Hype and Fundamentals*, Valuation Strategies, RIA/WG&L, 16, 1, 19 pp, Sept/Oct 2012.

8. Hammer, S., Russo, C. (2012). *Tax-Advantaged Investing Strategies for an "Unusually Uncertain" Economy*. Journal of Accountancy, AICPA, 213, (5), 28-33, 2012.

9. Russo, C., Kaynama, S. (2012). *The Impact of Personality Type and Gender on Students' Performance in a Business Capstone Course*, Academy of Educational Leadership Journal, 16, (1), 49-68, 2012.

10. Russo, C., Mitchell, J.W. Jr., Hammer, S. (2009), *Exclusion for Income from Discharge of Indebtedness: Mortgage Debt Forgiveness*. The Tax Adviser, August 2009.

11. Russo, C., Green, J. C., Staley, A. B. (2009), *Gas Leases Can Blow Up Hunting Clubs*, The Pennsylvania CPA Journal, spring 2009.

12. Russo, C., Green, J. C., Staley, A. B. (2008), *Tax Consequences of the Rush for Natural Gas in the Appalachians*. The Tax Adviser, August 2008.

13. Russo, C., Staley, A. B., (2007). *Integrating Information Technology in the Undergraduate Tax Accounting Curriculum*. Northeast Journal of Business and Economics, 13 (1), 61-66, fall 2007.

14. Bealing, W. E., Baker, R. L., Russo, C., (2006). *Personality: What It Takes to be an Accountant*. The Accounting Educator's Journal, fall 2006.

15. Russo, Charles J., Staley, A. Blair, Williamson, Donald T. (2004). *Dependency Exemptions for Children of Separated Parents: The Case of Never Married Individuals*, Taxes THE Tax Magazine, CCH, October, 2004.

Presentations and Published Proceedings

1. Crane, M., DiGabriele, J., Lohrey, P., Pannese, D. Russo, C., (2016). *Introduction to Business Valuation Part I,* Half-day interactive panel discussion with applications including valuation standards, purposes, financial statement analysis, normalization adjustments. 100th American Accounting Association National Conference, August 2016, New York, NY.

2. Crane, M., DiGabriele, J., Lohrey, P., Pannese, D. Russo, C., (2016). *Introduction to Business Valuation Part II,* Half-day interactive panel discussion with applications including income asset, and market approaches, valuation discounts and premiums, and valuation of pass-through entities. 100th American Accounting Association National Conference, August 2016, New York, NY.

3. Martin, Jr. C. L., Russo, C. J. (2015). *Sherb & Co. LLP: The Master of Botched Audits A Triple Play of Misconduct*, Society of Business Industry and Economics, Annual Meeting, April 2015, Destin, FL, Published Proceedings.

4. Mertins, L., Russo, C.J, (2013). *The Impact of Recession on the Business Valuations of Privately Held Companies: An Empirical Analysis*, AAA Mid-Atlantic Regional Meeting, Montclair State University, April 18-20, 2013, Parsippany, NJ, Published Proceedings.
    a. Research Cited in *The Value Examiner*, August 2013, Academic Research, Academic Research Briefs, By James A. DiGabriele: Summary, Previous Research Cited in the Study, Digest of findings, Conclusions and Implications. *The Value Examiner* is the flagship publication of the National Association of Certified Valuation Analysts. *The Value Examiner*, August 2013, pages 36-37.

5. Russo, C.J., Stone, A., Martin, Jr., C. L. (2013). *Fraud Case: World Health Alternatives, Inc.*, AAA Mid-Atlantic Regional Meeting, Montclair State University, Parsippany, NJ, Published Proceedings, April 18-20, 2013.

6. Russo, C.J., Mertins, L., Martin, C. (2012). *Business Valuation Acquisition Premiums and Tax-Affecting Earnings of Pass-through Entities*, AAA Mid-Atlantic Regional Meeting, Published Proceedings, Philadelphia, PA, April 19-21, 2012.

7. Russo, C.J., Mertins, L., Martin, C. (2012). *A Case of Fraud: Phoenix House*, Society of Business Industry and Economics, Annual Meeting, April 2012, Destin, FL, Published Proceedings, April 2012.

8. Baker, R.L., Bealing, W.E., Russo, C. J., Staley, A. B. (2007). *A Short Form of the Keirsey Temperament Sorter to Predict Success in an Introductory Accounting Course*, NEDSI 2007 Annual Conference, San Juan, Puerto Rico, Published Proceedings, March 2007.

9. Russo, C.J., Staley, A.B., (2006). *Integrating Information Technology in the Undergraduate Tax Curriculum.* APUBEF Conference, State College, PA, Published Proceedings, October 2006.

10. Baker, R.L., Bealing, W.E., Russo, C.J., Staley, A.B. (2006). *Correlation Between Personality Type and Success in an Introductory Accounting Course*. NEDSI 2006 Annual Conference, San Juan, Puerto Rico, Published Proceedings, March 2006.
    a. Conference Award. "*Best Paper in Education*".

11. Russo, Charles J., (2004). *Selected Academic Variables Correlating with Success on The Uniform CPA Examination in Pennsylvania*, NESDI Annual Conference, Atlantic City, NJ, Published Proceedings, Annual Meeting, March 2004.

12. Russo, C. J., Bealing, W., Baker, R. (2003). *Personality: What It Takes To Be An Accountant*, APUBEF Conference, State College, PA, Published Proceedings, October 2003.

Working Papers

1. DiGabriele, J., Russo, C. (2017). *Business Valuation Discounts, Premiums, and Pass-through Entities*, Journal of Forensic and Investigative Accounting, Submission 2017.
2. Russo, C., Mertins, L. (2017). *Impact of Economic Recession on Financial Performance of Construction Companies.* Research with Dr. Lasse Mertins, Associate Professor, Johns Hopkins University. Working Paper. Data analysis stage.
3. Mertins, L., Russo, C, (2017). *The Great Recession and Financial Performance of Oil and Gas Companies*, Working Paper, Planning stage.

This research program will add to a steady stream of research as we move to additional industries and examine multiple performance measures.

Dissertation

Russo, Charles J., *A Study of Academic Variables Related to Success on the Uniform CPA Exam in Pennsylvania*, Dissertation Abstracts, International, New York, 2002.

Contracts, Grants and Sponsored Research

Grant

Russo, Charles J. (Principal Investigator): "Relationship of Personality Type and Academic Performance in Accounting and Business Courses," Sponsored by Towson University (summer research grant), Towson University, $5,000.00, Funded. (May 2009 – March, 2011). This grant generated two peer reviewed journal articles.

Service to the Profession

Officer/Committees of Professional Organizations

- MACPA Business Valuation and Litigation Support Committee 2012-2013
- NACVA, Washington D.C./Maryland State Chapter, Secretary, 2013-2014

Towson University Fast Pass Becker CPA Review 2012-2016

1. Business Combinations Consolidated Financial Statements.
2. Corporation Taxation
3. Partnerships, Estates, Trusts, Gifts Taxation
4. Individual Taxation
5. Financial Management
6. Macro and Micro Economics
7. Information Systems and Communications
8. Working Capital and Fixed Assets
9. Leases Liabilities and Bonds
10. Governmental Accounting.
11. Not-for-Profit Accounting

Continuing Professional Education as Instructor

1. Business Valuation Report Writing, Presentation to the Washington D.C./Maryland Chapter Meeting of the National Association of Valuation Analysts (NACVA), September 2013.
2. Tax Staff Training Level II Corporations, Partnerships, Pennsylvania Institute of CPAs/Parente Randolph, LLC, Philadelphia, PA, 2008 and 2009
3. Tax Staff Orientation Training, Pennsylvania Institute of CPAs/Parente Randolph LLC, Philadelphia, PA, 2008 and 2009.
4. Tax Staff Training Level I, Individual Taxation, Pennsylvania Institute of CPAs/Parente Randolph, LLC, Philadelphia, PA, 2008 and 2009.
5. Tax Changes and the New Administration, Delaware CPA Society, Hotel DuPont, Wilmington, DE, February 12, 2009.
6. Computing the Gain from the Sale of the Controlled Foreign Corporation Shares under IRS 1248, Council on International Tax Education (CITE), Conference on International Taxation, Philadelphia, PA, April 7, 2009.
7. Surgent McCoy's Complete Guide to Depreciation, Amortization, and Sale of Property – Issues, Planning, and Answers, Maryland Association of CPAs, 9/30/2005.
8. Determining How Much Money You Need to Retire and Tax Ideas and Money Management in Retirement, Indiana CPA Society, 11/21/2002, 11/22/2002, New York State Society of CPAs, 8/31/2001, Indiana CPA Society, 8/3/2001, New York State Society of CPAs, 7/27/01.
9. Advanced Strategies and Tactics of Wealth Accumulation and Retirement Planning", New Jersey Society of CPAs, 11/15/2002, Tennessee Society of CPAs, 12/28/2001, New York State Society of CPAs, 8/30/2001 New York State Society of CPAs, 8/2/2001, New York State Society of CPAs, 7/26/2001.
10. Surgent's Complete Guide to Budgeting and Forecasting for Decision Making, Indiana CPA Society, 8/13/2001, 9/27/2002, Pennsylvania Institute of CPAs, 9/9/2002, Massachusetts Society of CPAs, 12/6/2001
11. Surgent's Complete Guide to Cash Flow Analysis and Asset Management Consulting, Indiana, 9/26/2002, Pennsylvania Institute of CPAs, 8/30/2002, Tennessee Society of CPAs, 12/27/2001. Massachusetts Society of CPAs, 12/7/2001. Delaware Society of CPAs, 6/25/2001.
12. "Comprehensive Tools and Techniques of Investment Planning", Pennsylvania Institute of CPAs", July 23, 24, 25, 26, 2002.
13. "The Complete Guide to Preparing Limited Liability Company, Partnership, and S Corporation Income Tax Returns", New Hampshire Society of CPAs, 1/9/2002, Pennsylvania Institute of CPAs, 12/20/2001
14. Preparing Individual Tax Returns for New Staff and Para-Professionals", New Hampshire Society of CPAs, 1/8/2002.
15. "Preparing Corporate Tax Returns for New Staff and Para-Professionals", New Hampshire Society of CPAs, 1/7/2002.

Participation in Meetings and Workshops of the Profession

1. The Interpretation of Financial Statements, CPE Think, 2016
2. Intangible Asset Valuation, CPE Think, 2016
3. Valuing a Business: The Analysis and Appraisal of Closely Held Companies, McGraw Hill, 2016
4. Business Valuation Recertification Case Study: NACVA, 2016
5. Ethics and Professional Conduct for Maryland CPAs, 2015.

6. Litigation Consulting Services, BISK, February, 2014.
7. Understanding Business Valuations, December 2013, AICPA.
8. Ethics and Professional Conduct for Maryland CPAs, August 2013.
9. Intellectual Property Damages, NACVA, D.C./Maryland Chapter, July 2013
10. Business Valuation Case Analysis, NACVA, D.C./Maryland Chapter, July 2013
11. Institutional vs. Personal Goodwill, NACVA, D.C./Maryland Chapter, July 2013
12. Ethics and Professional Conduct for Maryland CPAs, July 2011.
13. Case Studies in Business Valuation – Facts to Conclusions, April 2010 NACVA.
14. Special Purpose Valuations, April 2010, NACVA.
15. Business Valuations Case Analysis – Completed Transaction and Guideline Public Company Methods, April 2010, NACVA.
16. Business Valuations: Applications and Calculations of the Income and Asset Approaches, March 2010, NACVA
17. Business Valuations: Fundamentals, Techniques and Theory, March 2010, NACVA.
18. Providing Tax Due Diligence Services in Mergers and Acquisitions Transactions, PICPA, January 16, 2009
19. Advanced Federal Income Taxation of Estates, Trusts, and Beneficiaries and Advanced 1041 Return Preparation Issues, PICPA, June 30, 2008.
20. Council on International Taxation: U.S. International Tax Reporting and Compliance. December 10 and 11, 2007, New York, NY.
21. Clearing the Fog in Advanced LLC & Partnership Structuring, May 25, 2006 Surgent McCoy, Mt. Laurel Resort, White Haven, Pennsylvania.
22. Multistate Tax Update, May 19, 2006, PICPA
23. Manufacturer's Deduction under Section 199. January 6, 2006, PICPA, Allentown, PA
24. Surgent's 2005 Tax Update, October 21, 2005, PICPA, Dubois, Pennsylvania.
25. Loscalzo's 2005 FASB and AICPA Update, October 24, 2005, Dubois, Pennsylvania.
26. PICPA Education Symposium: Penn State Great Valley October 2005.
27. Association of Pennsylvania University Businesses and Economics Faculty Annual Meeting (APUBEF) Conference, State College, PA, October 2004.
28. NEDSI (North East Decision Sciences Institute): NEDSI Conference in Atlantic City New Jersey in March of 2004.
29. SAP Innovation Congress, Orlando Florida, February 2004.
30. PICPA Educator's Conference: PICPA Educator's Conference at the Penn State Great Valley October 2003.
31. Association of Pennsylvania University Businesses and Economics Faculty Annual Meeting (APUBEF) Conference, State College, PA, October 2003.
32. PICPA Educator's Conference: October 1998.
33. Case Studies in Business Valuation – Facts to Conclusions, May 1998 NACVA.
34. Special Purpose Valuations, May 1998, NACVA.
35. Business Valuations Completed Transaction and Guideline Public Company Methods, May 1998, NACVA.

36. Business Valuations: Applications and Calculations of the Income and Asset Approaches, May 1998, NACVA.
37. Business Valuations: Fundamentals, Techniques and Theory, May 1998, NACVA.

Service to the Community

1. College of Business Advisory Board, Bloomsburg University of Pennsylvania (2007 – 2009).
2. Presentation: Russo, C. J. (August 2, 2007). *Sales and Use Taxes.* Wilkes University Small Business Development Center in Wilkes-Barre, PA.
3. Presentation: Russo, C. J. (November 7, 2007). *Employee and Independent Contractor Issues*. Pennsylvania Association of Intermediate Units: Annual Meeting, Public School officials.
4. Middle States Program Accreditation Reviewer, MS Accounting and Financial Management, University of Maryland University College, 2006
5. Presentation: Russo, C. J. (2006). *Helping Constituents Make Financial Plan.* APSCUF Leadership Conference in Harrisburg, Pennsylvania, May 2006.
6. Television: Russo, Charles, and Spiecher, Tom, Financial aspects of automobile buying, 30 minutes, Penn College and You, Pennsylvania College of Technology/Penn State, October 8, 2002.
7. Television: Russo, Charles, and Spiecher Tom, Managing Your Money, 60 minutes Penn College and You, Pennsylvania College of Technology/Penn State, 10/2/2001
8. Television: Russo, C., and Spiecher Tom, Managing Your Money, 60 minutes Penn College and You, Pennsylvania College of Technology/Penn State, 10/2/2001
9. Television: Russo, Charles, and Spiecher Tom, Managing Your Money, 60 minutes Penn College and You, Pennsylvania College of Technology/Penn State, 1/4/2000
10. Radio: Ken Sawyer Talk Radio Show, Income Taxes, (March 1998). WRAK FM, 60 minutes.
11. Television: Penn College and You, Managing Your Money (November 1997). 60 minutes, SCN Channel 2
12. Radio: Ken Sawyer Talk Radio Show, Income Taxes, (March 1997). WRAK FM, 60 minutes.
13. Television: Penn College and You – Income Tax Help. (March, 1997). 60 minutes, SCN Channel 2.
14. Television: Penn College and You – Income Tax Help. (March, 1996). 60 minutes, SCN Channel 2.

Accolades and Affiliations

- Microsoft Pinnacle Award for Excellence in Education 2006
- LEAP – Partner Track Leadership Program at Parente Randolph, LLC 2007-2009
- American Accounting Association
- Beta Alpha Psi
- Best Paper Award: NEDSI 2006 annual conference, San Juan, Puerto Rico, March 2006
- Institute of Management Accountants 1995-present
- MBA Outstanding Academic Achievement Award –- Nova Southeastern University 1991
- NYSSCPA Outstanding Service Award, 1990-1991. A&A, Practice & Procedures Committee
- NYSSCPA Outstanding Service Award, 1989-1990. A&A Practice & Procedures Committee