

# We're About Success!

*Advancing diversity, equity, and inclusion in the accounting profession*

## In This Issue

**Virtual Accessibility  
Extends Reach of College  
Programs**

**Congratulations to New  
KPMG Partner**

**Dean Wilbon Completes  
First Year**

**HUSB Alumnus Serves as  
George S. Willie Lecturer**

**Thank You & Farewell  
Mrs. Kellibrew**

**Dr. Mayse Introduces  
Children to the  
Accounting Profession**

**Faculty Recognizes  
Student Success**

**A CPA Success Story**

**Untold Stories of HBCU  
Accounting Students**

**Backstory on the CPA  
Exam**

## We're About Success Returns with Record Numbers

The 16<sup>th</sup> Annual Leadership Skills Development Program was held from Monday, June 28 through Thursday, July 1. This Program is unique in being wholly dedicated to bringing together African American emerging leaders in public accounting. The fully virtual Program ran on the Remo/Lunchpool platform and boasted 154 participants from nine global CPA firms including Crowe, a new CAE stakeholder. "What a phenomenal experience! Our participants expressed appreciation and were re-energized from the Program", shared Karen Thompson, Firmwide Campus Recruiting Leader at Crowe."



Leaders participated in firm-sponsored sessions spanning unconscious bias, critical feedback, mentorship, managing up, and project management. These sessions were designed to provide concrete opportunities for leadership skill-building and establishing communities amongst like-minded professionals. Eager to put learning into practice, one leader identified the following action items, "My key takeaways are (1) get the CPA, (2) stay in public accounting until manager to get that experience to determine whether you want a long-term career in public accounting, (3) get a sponsor and mentor as they play a critical role in helping you make important career decisions, and (4) build your network - it's all about who you know."

To raise awareness of the challenges and opportunities in the profession, a panel of African American partners reflected on their experiences that helped them build and sustain a career in a profession with 1% Black/African American partners (AICPA 2019 Trends report).

Leaders had the opportunity to ask questions of the panelists who represented different practices: Shannel Clubb – RSM Insurance Management Consulting, Traceè D. Jones – PwC Audit Asset & Wealth Management, Aazan St. Rose – Crowe Audit, and Nick Dulo, BDO Tax. A leader summed up the discussion by stating, “Amazing session! Their perspectives were very insightful and will aid us in strategizing as we move forward. I cannot stress how valuable it is to have real candid feedback from partners. Great representation in leadership: keep leading by example!!!!”

A special thank you to our opening speaker, Sam Johnson, EY Americas Vice Chair, Markets and Accounts, and closing speakers, Bradley J. Preber, Grant Thornton CEO and Mark Thornton, Grant Thornton Principal. Leaders were empowered and completed the Program with a renewed career-focus.

## **College Programs Succeed in Virtual Space**

The Frank K. Ross Leadership Institute is a two-day leadership program where students learn how to succeed and explore corporate America. This program identifies aspects of organizational culture that could potentially be different from students and assists them in developing practical strategies as they advance. By partnering with CPA firms, CAE ensures the program offers important insights and inroads to the accounting profession.

Over 700 students applied to attend one of the four programs co-sponsored by KPMG. Programs were held in Washington, DC/Philadelphia, New York City, Atlanta/Charlotte, and Chicago/Mid-West areas. Approximately 50 – 60 students were invited to attend each program.

CAE partners with EY and McConnell Jones to host a program at Texas Southern University. Many of the participants were enrolled in a CPA Bootcamp and remarked that the program motivated them to stay the course.

## **New KPMG Partner: Congratulations Erik Causey**



Erik earned both his MBA and bachelor's degree from Howard University. Last fall, he was promoted to partner at KPMG

LLP. Based in the Washington DC office, Erik leads campus recruiting at Howard University, facilitates national trainings, and has served as a statistical sampling specialist. Erik is also the partner champion for the Washington DC/ Tysons Corner African Ancestry Business Resource Group.

Throughout his career, Erik has been a strong advocate of CAE. He has evaluated, designed, and facilitated many of our programs. He understands the importance of building mentorship and sponsorship relationships especially as students transition from university to the workplace.

Outside of work, Erik is the board chairman of The Fishing School and Victory Youth Center. Erik is an alumni of the AICPA Leadership Academy. Erik, his wife Moweale and sons, Andrew and Gabriel, enjoy spending time with family and friends.

Dr. Anthony Wilbon was appointed the new Dean of the School of Business on July 1, 2020. During his inaugural year, Dean Wilbon has made significant strides in the program development and fundraising activities that have resulted in several new multi-million dollar initiatives. Some of the programs and initiatives established are:

- Marriott-Sorenson Center for Hospitality Leadership with a \$21 million gift from the Marriott Foundation.
- Center for Financial Excellence with a \$10 million gift from HPS Investment Partners and Kapnick Foundation.
- Center for Entertainment and Music Business with a \$5 million gift from Warner Music and the Blavatnick Foundation.
- Dr. Abraham Pishevar Endowed Chair of Finance and Entrepreneurship with a \$3 million gift from the Pishevar family.
- ALTFinance program with a 10-year, \$90 million commitment from a partnership between Apollo Management, Ares Investment and Oaktree Capital Management. Morehouse College, Clark Atlanta University, and Spelman College are partner HBCUs. The goal is to diversify the alternative investment industry.

To cap off his inaugural year, the School of Business full-time MBA Program was recently ranked Number 30 in Fortune Magazine. The first line in the [supplemental article](#) sums up not only the MBA program but also is an apt description of Dean Wilbon's first year accomplishments: "Howard University's full-time MBA program is small but mighty."

Congratulations, Dean Wilbon on an excellent first year at the helm of the School of Business. CAE wishes you continued successes!

## Dr. Anthony Wilbon Celebrates First Year as Dean with Strategic Initiatives



## HUSB Alumnus Inspires Students at George S. Willie Lecture Series



Since Spring 2017, the George S. Willie Lecture Series has exposed students to influential leaders in the accounting profession. Continuing this legacy, last Fall Lawrence Ballard – PwC Partner, served as the lecturer.

As an alumnus of the Howard University School of Business, Lawrence generously extended his schedule to accommodate three classes: Audit – junior and senior accounting majors, Business Orientation – freshmen business students, and Accounting Principles I & II – sophomore business students. All lectures were held virtually on Thursday, November 12 and engaged more than 600 students.

Ballard tailored his address to each class and enjoyed responding to the spirited questions from the students who were clearly intrigued and motivated. He encouraged students to do an assessment of their purpose and build that sense of purpose around something bigger than themselves to fulfil personal and professional goals. Ballard stressed the importance of students taking the time to ensure companies share values that are consistent and important to them.

CAE is pleased that the lecture was a great success. We are now planning for the next series. Email [caehusb@howard.edu](mailto:caehusb@howard.edu) for more details.



## **Thank You for Your Service: Pat Kellibrew**

Patricia Kellibrew (fondly referred to as Pat) began working with the Center for Accounting Education (CAE) in April 2005. During her 15-year tenure, Pat left an indelible mark on the CAE by coordinating numerous programs for a range of individuals from high school students (Accounting Career Awareness Program) to community college students (Accounting Scholars Development Program) to college seniors (Frank K. Ross Leadership Institute), and to accounting professionals in various stages of their careers (Accounting Leadership Development Institute and the We're About Success! Program (WAS)). For 15 summers in Northern Virginia, Pat was the behind-the-scenes coordinator and on-site fixture at WAS, the CAE flagship program: from negotiating contracts with the hotels and other vendors, arranging breakout sessions and seating, to assisting participants, presenters, panelists, guests, and Howard University faculty when they were on site. Pat was the go-to person for all of us when we needed to know where we were supposed to be or had issues – like losing our name badges or just needed someone to talk to. Pat was always eager to help.

Pat also coordinated meetings with various stakeholders including the AICPA, NABA, NASBA, Center for Audit Quality, Chief Diversity Officers, accounting firms and accounting state societies. Pat was also responsible for on-campus activities including the George S. Willie Lecture Series and the sessions where Howard University accounting alumni returned to share their experiences with the students.

Pat decided to retire in August 2020 – in the middle of COVID-19 and after the 2020 WAS program was cancelled – so we were not able to host a retirement party for her – which was scheduled to take place at the WAS program. It is difficult, if not impossible, to sum up Pat's many contributions to CAE. Her hard work, dedication, and congeniality were integral to the growth and success of CAE which we intend to continue. We wish her all the best as she continues to enjoy this new chapter of her life.

## **CAE Advisory Board**

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RSM US

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## Dr. Mayse Introduces Children to the Accounting Profession

Dr. Adrian Mayse, CPA, is the Department Chair of Accounting at Howard University School of Business where he teaches both undergraduate courses: Accounting Information Systems, International Accounting, and a graduate course in the Master of Accountancy program: Seminar in Accounting. He serves on the Howard University Center for Accounting Education Advisory Board, the North American Accounting Society Board of Directors, the MBAA International Advisory Council, the Barbershop Books Board of Directors, and the Hurston/Wright Foundation Board of Directors. He has been recognized for being the youngest tenured Associate Professor of Accounting at Howard University and was awarded the 2021 Business of Pride by the Washington Business Journal.

Dr. Mayse is a native of Victoria, Mississippi and he received his B.B.A. in Finance from the University of Mississippi. In 2007, he received his Master of Professional Accountancy (M.P.A.) from Jackson State University. Dr. Mayse worked for the Mississippi Department of Revenue (formerly the Mississippi Tax Commission) for three years as a tax auditor. He became a Certified Public Accountant (CPA) in 2010. Dr. Mayse taught as an instructor at Jackson State University in 2012-2013. He received his Ph.D. in Accounting in 2014 from Jackson State University. Dr. Mayse taught as an Assistant Professor of Accounting at Middle Tennessee State University from 2013-2015. Currently, he is a member of the American Accounting Association (AAA), the American Institute of CPAs (AICPA), the PhD

Project, the National Society of Black CPAs (NSBCPA) and the National Association of Black Accountants (NABA). He has also been featured in Clarion Ledger for his opinion piece on the importance of diversity and inclusion by providing awareness that we can't break through barriers and leave others behind. He has a passion for diversity, inclusion and equity in the workplace, classroom and the world.

Dr. Mayse has written "When I Grow Up I Want To Be... An Accountant" - a fictional book that exposes children to the world of accounting. This book allows children of diverse backgrounds to see themselves as accountants on the pages through creative and colorful artwork. Frank Ross, CAE Director wrote the foreword to the book. He states "his hope is that students at an early age hear about the field of accounting. Many times, we see young students being inspired to be doctors, lawyers, and teachers, but we do not expose students at an early age to the career field of accounting. It is also my hope to increase African Americans who are in the field of accounting and for the accounting profession to look as diverse as the world."

He currently resides in Washington, DC with his fiancé, Duvalier Malone and their dog, Guy.





## **Faculty Recognizes Student Success: Kaim Welcher by Professor Jean Wells**

Kaim Welcher is an exemplary graduate of the accounting program here at Howard University. Kaim was a member of the School of Business Executive Leadership Honors Program, an invitation-only program where students are interviewed for membership. This allowed him to hear from dozens of business professionals, attend multiple annual professional conferences, and participate in case study competitions each semester. Kaim was awarded numerous scholarships due to his academic achievement including Howard University's prestigious Capstone Scholarship, Deloitte's Audit and Assurance HBCU Emerging Leaders in Accounting Scholarship, and the International Association of Black Actuaries Scholarship.

When I was injured in a car accident in summer 2019, I missed the first few weeks of classes. Kaim was chosen by the faculty as an exemplary student who could bridge the gap during this time and effectively teach my Accounting Principles students and prepare them for their first test. Kaim took on the challenge by mobilizing a team of his fellow honors students. He successfully created and executed a plan through effective delegation and communication. He was able to be an integral chain in communication between faculty, students, and the new team of "teachers." Under his tutelage, the students were prepared for their accounting test as scheduled. Upon my return, I was able to resume my lectures and complete the course schedule without any slowdown or modification in the course coverage.

In Fall 2020, I prepared letters of recommendation to support Kaim's applications for graduate school. By April 2021, Kaim was accepted to all six schools that he applied to. Kaim prepared a detailed Excel spreadsheet that contained an impressive list of schools, ranging from state schools to ivy league schools, and solicited my assistance with helping him select a school. This is a testament to the quality education that the School of Business has and the nurturing relationship that faculty has with students. We meticulously weighed the pros and cons of attending each school considering the course offerings, prestige, costs, location, scholarships, and most importantly – his family. Kaim will be attending the University of Georgia – on a full scholarship - to pursue a Dual Degree in Accounting and Financial Planning while simultaneously pursuing a CPA License. Kaim is the oldest of four siblings and chose the University of Georgia, in part, so that he could be close to home and be able to visit his siblings regularly.

Kaim is prepared to start his career as a valuable member of a public accounting firm or corporate finance team. He has taken Fortune 500 Internships with PwC (Summer 2019), Deloitte (Summer 2020), and Ally Bank (Summer 2021). In addition, he has furthered his professional development through participation in numerous professional conferences with prestigious companies and organizations such as Wells Fargo, The University of North Carolina - Chapel Hill, and CVS Health. He will seek a career utilizing his quantitative, analytical, and communication skills in the Sports and Entertainment industry, leveraging his background to drive decision-making where his passions lie.

Kaim, it was a delight nurturing you over the past 4 years and watching you mature and flourish here at Howard University. All the very best with your studies and future endeavors.

## A Success Story of Perseverance & Determination

After a 12-year battle with the CPA exams, ZeNai persevered and obtained her CPA license in February 2021. Living in Indianapolis, IN, ZeNai is an accomplished professional with over 13 years of experience. ZeNai's passion and strengths are married within her current role as the Corporate Responsibility and Foundation Controller for Cummins. She is also a dedicated community leader, serving as Regional President and National Director for the National Association of Black Accountants (NABA) and other local boards. But her most important service role is as the First Lady of her church.



All that said, as a mid-level professional, ZeNai had already established a professional reputation and was on track for major success. But, if you ask ZeNai, she would say that her journey to pass the CPA exam cast a shadow over her career. ZeNai dedicates a significant amount of time volunteering for the accounting profession, but she describes a slight feeling of hypocrisy and burden when it came to her not actually having the license. One of the major challenges ZeNai faced over time was finding the time (and interest) to commit to studying, especially having failed several parts and even having parts that she did pass expire. As her involvement and networking continued to expand, her calendar was filled with priorities that were much more exciting than the CPA Exam. ZeNai encourages students and early professionals to sit for the exam as soon as they possibly can, and to do whatever it takes to pass it. Her motto is that it's better to have the CPA license and not need it, rather than to need it and not have it. The latter is a position that ZeNai found herself in many times. ZeNai recalls applying for jobs and being overlooked when she was technically overqualified, meeting all the experience from college degrees to practical working knowledge. The only factor was that she did not have the license.

ZeNai recalls watching her EY peers receive promotions and high-level jobs at other organizations. After ZeNai obtained her CPA license, she received a job offer that propelled her career back into alignment with others in her age range. "I like to share these personal, and somewhat embarrassing stories to underscore the importance of the license. While you can absolutely be successful without having the CPA license, in this current environment, there are certain doors that only the CPA license can open."

Whether you are just starting your career or have been working in the profession for a while, know that the CPA license is obtainable. It just requires a higher level of discipline and perseverance. During 2020, with the help of the Covid-19 pandemic, ZeNai created a bubble where she could be laser focused on the CPA exam. She also created a study community, now known as NABA CPA Bound, where she and other working professionals studied together via Zoom, encouraged each other, and shared resources. ZeNai's plan included studying before work every weekday, with additional sessions on Saturday and Sunday. This strict but balanced schedule left room in the evenings for personal time, other board commitments and the occasional 30 question study session with her new future-CPA friends. Having clear boundaries with a disciplined plan and accountability partners helped ZeNai finally obtain her CPA license. She cannot stress enough the benefit of surrounding yourself with people who not only understand the journey but are on the same path with you. After 12 years of starting and stopping and failing and retaking, ZeNai completed all parts of the exam in seven months. ZeNai's final advice: Stay focused. When the journey gets a little bumpy, remember why you started and keep going until you finish!

# Examining the Untold Stories of Historically Black Colleges and Universities Accounting Students in Pursuit of the CPA License

This year marks 100 years since the first African American earned the distinction of being a Certified Public Accountant (CPA). Today, only 5,000 of the 650,000 CPAs in the United States (US) are Black. Although there is extant research on the dearth of Black CPAs, few studies have examined the factors that play a role in HBCU students sitting for the CPA exam. Furthermore, even fewer have captured these factors using a qualitative research approach. This summary presents the thematic findings of a study in which senior accounting students expressed their intent to sit for the exam and disclosed the barriers they are preparing to encounter.

**1 Show Me the Money** addresses the financial hardships students anticipate in preparing to sit for the CPA exam. Two of the participants are first-generation college students. Both are working to pay for university and upon graduation will have an average outstanding debt of \$10,000. The cost of the application, administration and examination fees for the CPA exam starts at \$1,000. This cost does not include the CPA exam review program which averages \$3,000. In addition, to meet the 150-credit hour requirement, participants intend to complete a master's degree program. Without financial aid or scholarship, the cost of the exam and earning a graduate degree could exceed \$40,000.

*"Getting my master's and then also paying for everything to gain the CPA is a barrier that I'm going to have to endure. For some reason, scholarships do not seem to be as available as I would like."*

**2 Bringing Up the Rear** centers on the increasing trend of accounting professionals transitioning to the academe as adjuncts and full-time professors. Students received strong support to pursue the CPA license when they were enrolled in upperclassmen courses taught by former practitioners. These faculty members demonstrated a genuine interest in the development of their students beyond the classroom. This theme underpins an opportunity for HBCUs to take advantage of the expanding pathways for practitioners to transition into the academe where informal mentoring can broaden a student's exposure to the profession and motivate them to pursue the CPA license.

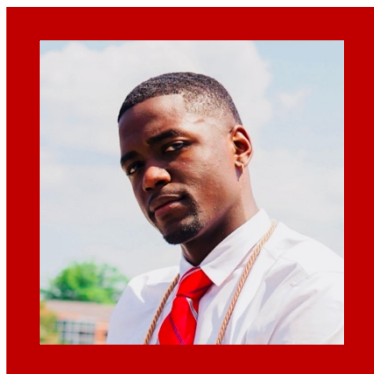
**3 CPA-centric Curriculum** acknowledges that the academic freedom of faculty provides a platform to weave CPA exam content throughout the curriculum. Prior to their enrollment, participants had limited knowledge of the profession and were ignorant of the CPA exam. One participant expressed frustration that introductory accounting courses did not adequately support accounting majors. HBCU faculty must assess the curricula and ensure it adequately prepares students to confront the profession's demands.

*"Last semester I was in a junior-level accounting course, and we did a CPA exam project...Because they were one of the only professors that actually does that sort of thing. I can definitely say that doing that project made the CPA seem so much more tangible for me."*

Altogether, these three themes emphasize the unique challenges faced by HBCU students. The cost barrier underscores the need for funding; early exposure can boost a student's career trajectory when advised by engaged faculty who fully understand the road ahead; and faculty must develop a robust curriculum that ensures students are comfortable making a firm commitment to pursue the CPA.



## Gregory Carrington's Backstory on the CPA Exam



Gregory Carrington, CPA, graduated from the Master of Accountancy program in 2019. While a student, Greg also served as a Graduate Assistant for the CAE. Greg is a Senior Auditor at KPMG. His plans include consulting and accounting entrepreneurial endeavors. Here are Greg's thoughts on and advice for preparing for the CPA exam:

"Passing the CPA exams is one of my favorite accomplishments to date. Not only because it felt like the completion of my formal accounting education; but

because of my journey to get here. I took a total of 8 exams, I got a score of 74 twice, and from start to finish it took me 17 months to pass all four parts. It made me realize the saying "persistence is key" is cliché for a reason.

If I had to give advice on how to be efficient with your CPA journey; first I would say complete your application and get your NTS as soon as you're eligible. If possible, start taking exams before you start your career because studying and working is extremely challenging. Finally, persevere through; if you can grasp the basic concepts of accounting, the CPA exam comes down to how many hours you put in and what you put into the hours."

Congratulations Greg and best wishes from the CAE as you progress in your accounting career.

## About the Center for Accounting Education

The Howard University School of Business Center for Accounting Education (**CAE**) is a leading national resource center for the accounting profession. CAE provides effective, results-driven programs; profession-wide collaboration; action oriented and focused research. We offer a program for every career step - from attracting African American students into the profession to developing future African American leaders. During our 16-year history, more than 4,000 students and young professionals have benefitted from the myriad of leadership sessions CAE has developed with the assistance of a group of stakeholders representing the major accounting firms in the nation.

CAE conducts and publishes academic research into the challenges of attracting, advancing, and retaining African Americans in accounting and uses these findings to develop meaningful, effective programs to help the profession achieve its diversity goals.

Profession-wide collaboration is accomplished through our constant exchange of ideas with the international, regional, minority-owned accounting firms, state societies, and AICPA working together. With financial support from our stakeholders, CAE has been able to launch leadership programs, seminars, and research studies. Each one of these initiatives is designed to increase the number of African Americans successfully advancing up the ranks of the accounting profession.

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