

Thomas Whalen

Instructor

Education

MS, Boston College, Chestnut Hill, MA, Administration, 2001

MBA, Northeastern University, Boston, MA, Accounting, 1992

BS, Boston College, Chestnut Hill, MA, Computer Science & Management, 1976

Teaching Interests

Financial Accounting, Managerial Accounting, and Tax (Individual & Corporate)

Research Interests

Financial Accounting & Reporting in State/Local Government, Small Business Accounting Systems, Tax Reporting for Not-For-Profits.

Special Certifications and/or Designations

Certified Public Accountant. (2007 - Present).

Honors/Awards

Teaching

2009: SBS Faculty of the Year, 2008 - 2009., Student Government, Leadership, and Activities Committee on Teaching Excellence.

2008: Finalist for SBS Faculty of the Year; 2007 - 2008., Student Government, Leadership, and Activities Committee on Teaching Excellence.

2007: Finalist for SBS Faculty of the Year; 2006 - 2007., Student Government, Leadership, and Activities Committee on Teaching Excellence.

2006: SBS Faculty of the Year, 2005 - 2006., Student Government, Leadership, and Activities Committee on Teaching Excellence.

2006: Dean's Award for Excellence in Teaching, September 2006., Suffolk University, Sawyer Business School.

2005: Finalist for University Professor of the Year; 2004 - 2005, Student Government, Leadership, and Activities Committee on Teaching Excellence.

2004: Accounting Professor of the Year, 2003-2004, BETA ALPHA PSI - Accounting Fraternity.

2004: Finalist for University Professor of the Year; 2003 - 2004, Student Government, Leadership, and Activities Committee on Teaching Excellence.

ACADEMIC EXPERIENCE

Business/Professional Experience

Treasurer & Director, Boston Metal Finishing, Inc., Served as treasurer-controller for small business operations. Responsibilities included financial and managerial accounting systems operations, maintaining banking relationships, and tax reporting in a small business environment ., Boston, Massachusetts (1985 - 2008).

Tax Associate, Keegan, Werlin, & Pabian, PC., Developed an Income Tax System to handle the Tax Planning and Reporting function for the firm's diverse client base., Boston, Massachusetts (2001 - 2003).

Accounting Manager, City of Boston Treasury Department, Held various positions across 23+ years, most notably Manager for Accounting & Special Assessments from 1987 - 2000. Duties included operations management of department and all financial reporting activities as required by GASB, and Comm of MA statutes. Annual revenue budget from all sources exceeded \$2.0B.

Most recent project management involved supervising a project team of Treasury Dept staff and I/T Dept team to redevelop the accounting systems and database management for Tax Accounts held by the Collector-Treasurer (CFO). Implementation increased annual revenue recognition by over 30%. Outcomes included publishing of Users' Manual for systems operation by all relevant line-departments., Boston, Massachusetts (1977 - 2000).

Consulting

2010: City of Braintree, MA - Treasurer-Collector's Office (2009 - Present), Perform duties of City Treasurer-Collector..

2008: Roxbury Youthworks, Inc. (2008 - Present), Accounting Manager.

INTELLECTUAL CONTRIBUTIONS

Faculty Development

Seminar

2009: Serving as Faculty Advisor to Suffolk University, Theta Delta Chapter 189. Three day conference with Student Officers included Community Service Day, Seminars and Workshops, and Networking dinners. Brooklyn, New York.

2009: Annual Government Accounting & Auditing Conference Natick, Massachusetts.

SERVICE ACTIVITIES

University Assignments

Other Institutional Service Activities

2009: Undergraduate Open House - November 2009; Represented Accounting Department at University recruiting event, 11/14/09..

2008: Undergraduate Open House - November 2008; Represented Accounting Department at recruiting event, 11/15/08..

Department Assignments

Faculty Advisor

2009: Beta Alpha Psi - Faculty Advisor; Service to the Accounting Department in all areas of BAP Theta Delta Chapter 189, including recruiting student members, guiding delivery of Weekly Speaker Meetings, providing direction for Student Service Activities, and attendance at Annual Meeting (National) and Regional Meeting..

Public Service

Other Community Service Activities

2010: City of Boston, Earned Income Tax Coalition; Faculty liason to training staff for Income Tax Prep course..

Professional Memberships

American Institute of Certified Public Accountants. (2007 - 2010).

Massachusetts Society of Certified Public Accountants. (2007 - 2010).

Institute of Management Accountants. (2005 - 2010).