
LOUIS P. D'ELIA

80 78th Street
Brooklyn, New York 11209

E-mail: ldelia@sfc.edu

Home: (718) 836-2774

Cell: (917) 337-7944

Office: (718) 489-5288

EDUCATION

Doctorate of Business Administration

Saint Leo University, Florida March 2019

Business Administration/Management – Educator Track

Nominated as Graduate Salutatorian April 2019

Master of Business Administration

Pace University, New York, New York, 1988

Finance

MBA Degree Awarded – *With Distinction*

Bachelor of Science

Wagner College, Staten Island, New York, 1981

Accounting

Magna Cum Laude, Expedited Degree (3 years)

TEACHING EXPERIENCE & SERVICE

St. Francis College (Brooklyn, New York)

- **Assistant Professor** – Department of Accounting and Bus Law **2013-Current**
- **Program Director** – BS/MS & MS Program in Accounting **2018-Current**
- **Chairperson** – Department of Accounting and Business Law **2023-Current**
- **Coordinator** – Department of Management & Info Technology **2023-Current**
- **Duns-Scotus** – Inducted into SFC's most prestigious society **May 2020**
 - **Keynote Address** **Charter Day 2020**

Standing and Other Committees:

- Admissions, Scholarships, and Financial Aid **2022- Current**
- Statutes Committee **2014 –2017**
- Athletic Policy Committee **2017 – Current**
- Faculty Development Committee (Stand-in/Member on sabbatical) **2014 – 2015, 2024**
- Faculty Development Committee **2015-2018**
- Advisor to Master's in Accounting Program **2014- 2018**
- Recruitment Council Subcommittee on New Program Development (Online/Hybrid) & Graduate Programs **2019-Current**
- Academic Assessment Advisory Council **2020- 2023**
- Subcommittee for Hiring Major Grant Officer **2019 - 2022**
- Ad Hoc Committee – Subcommittee for New Program Develop. **2018 – Current**
- Ad Hoc Committee – Masters' Program Development **2018 – Current**
- Ad Hoc Committee – Admissions Support **2018 – Current**
- Ad Hoc Committee – Marketing Support Team **2018 – Current**
- Co-chair National Association for Black Accountants Membership **2019 – Current**
- CSTEP Advisory Board **2024 - Current**

TEACHING EXPERIENCE & SERVICE (Continued)

Student Accounting Society Assistant Moderator/Advisor**2014 – Current**

Serve as a liaison between student officers of the Accounting Society and SFC administrators. This function includes assisting in the coordination and promotion of meetings and events.

Coordinator and Keynote Eulogy – Student Memorial Service**2021**Courses Taught At SFC

Elementary Accounting I, Elementary Accounting II, Accounting Information Systems (BS and BS/MS), Advanced Accounting Information Systems, Auditing (BS and BS/MS), Advanced Auditing (BS and BS/MS), Intermediate Accounting I (BS and BS/MS), Intermediate Accounting II (BS and BS/MS), Advanced Accounting (BS and MS), Special Topics in Accounting, Graduate Seminar in Accounting, Internships, Financial Accounting for Managers (MS in Management), Managerial Accounting (MS in Management).

Courses Developed or Significantly Revised

- Accounting Information Systems – Completely overhauled to match the needs of current employers, adding advanced Excel features and eliminating Sage Peachtree Accounting by replacing it with QuickBooks.
- Advanced AIS – coauthored complete overhaul to include highly popular Data Analytics into the course.
- Advanced Auditing – overhauled by introducing real world case studies with a focus on ethics and accounting irregularities.
- Elementary Accounting I – changed to eliminate managerial accounting and information technology components to better focus on Accounting Cycle.
- Elementary Accounting II – Complete and innovative overhaul replacing three cost accounting related chapters with an intensive review of the components of the Accounting Cycle introduced in Elementary Accounting I.
- Masters' Program in Management – Created new and highly successful ACC 6650- Financial Accounting for Managers currently serving over 700 graduate students each semester. Thirty plus sections combined Term A and B. Translates to annual *net income* of more than \$2.25 million for this one class alone.

Technology Introduced Into the Classroom

Developed and implemented computer cases and projects into the following courses: Elementary Accounting I, Elementary Accounting II, Accounting Information Systems, Advanced Accounting Information Systems, Advanced Audit.

Student Scholarships

Serve as the St. Francis College representative to the National Grid Scholarships to secure scholarships and internships on an annual basis for students. During my tenure, more than thirty SFC students have received scholarship awards and internships.

TEACHING EXPERIENCE & SERVICE (Continued)

Dolly Williams Scholarship Award

Serve as the coordinator of the annual Dolly Williams Scholarship awarded to students that show a high skill level at the Intermediate Accounting Level. .

Accounting Affinity Group Coordinator

Create network opportunities for the College and our students in the fields of accounting, business, investment banking, etc. Members consist of titans of the business world, former SFC alum, and other powers that serve as a monitoring committee for standards for Accounting.

Additional Teaching Experience Outside of the 12 years of Tenured Service at SFC

St. Leo University (Saint Leo, Florida)

2018

- **Assistant to the Professor** – Donald R. Tapia School of Business
Taught Organizational Management class to Doctoral Students and developed innovative grading system and APA 6 skills for current doctoral students.

St. John's University (NYC and Staten Island New York)

2002-2013

- **Associate Professor** – Accounting Department. Assigned courses in accounting as well as economics (money and banking) at the undergraduate level. Promoted from Assistant Professor to Associate Professor due to outstanding classroom achievement as an adjunct faculty member.

Wagner College (Staten Island, New York)

2003-2008

- **Assistant Professor** – Business Department. Assigned courses in accounting, not-for-profit organizations, and marketing at graduate and undergraduate levels.

PROFESSIONAL EXPERIENCE

Certified Public Accountant

D'Elia CPA, PLLC (Brooklyn, NYC and Long Island, N.Y.) **2015-current**

DeFino & D'Elia, LLC (Brooklyn, NYC and Long Island, N.Y.) **1985-2015**
Certified Public Accountants

Managing Member, Majority Partner

Principal responsibilities include training, marketing, personnel management and operating full-service accounting firm. Comprehensive services with a specialty in estate and advanced planning. Highly sought after speaker in Financial Planning and NPO community, including governing Boards.

Other notable services include:

- Championing successful merger and acquisition initiatives; overseeing development and management of personnel
- Setting the strategic vision and business goals for individuals and businesses alike in order to maximize performance and growth
- Building, retaining, and training of highly motivated and productive team of accounting, tax, and management advisory personnel
- Spearheading strategic alliances with legal, banking, and other financial professionals to increase revenue and expand market share

E.F. Hutton & Company (New York, New York) **1983-1985**

Manager, Financial Reporting

- Managed more than person department while overseeing activities for large brokerage
- Primary liaison between accounting, finance, and revenue producing departments
- Designed and implemented new reporting system for firm's regulatory department
- Developed reporting mechanism for firm's high net worth clients

Laventhol & Horwath (New York, New York) **1981-1983**

Supervisor/Senior Auditor, Audit and Accounting Department

Managed and performed all types of financial statement and quality control audits for diversified clientele, including real estate developers, real estate property management, banking, garment, wholesale, distribution, and food service industries. Promoted to senior in unprecedented time.

Financial Service Experience

Mass Mutual, NY Life and MetLife (Brooklyn, NY) **1999-Present**

Financial Services Professional

- Leading producer with specialized knowledge in advanced estate planning, charitable giving, elder care, investments, wealth transfer, and assorted tax services. Developed seminar selling techniques and strategy, as well as mentorship program. Qualified for membership in Division of Estate Planning for special needs population.

Multiple year recipient Million Dollar Round Table, President's Conference, Leader's Conference.

- Certificate Received/Earned – Special Needs Planning Specialist, Long-term Care Specialist, Multiple Rep of the Year Awards

SCHOLARSHIP

Dissertation

- **Title:** *Effects of business ethics education on moral reasoning ability of certified public accounting majors*

Submission Date: April 2, 2019

Manuscript ID: 2235421358

Published Journal: ProQuest Dissertation & Theses Global (Order No. 13863830). Available from ProQuest Dissertations & Theses Global. (2235421358).

<https://search.proquest.com/docview/2235421358?accountid=35812>

Published Work – Peer Reviewed Journal

- **Title:** *The Best Course of Action (Case Study in Ethics)*

Submission Date: May 14, 2019

Peer Reviewed Journal: Case Studies in Business and Management

<http://www.macrothink.org/journal/index.php/csbm/issue/view/854>

Publish Date: June 25, 2019. Vol 6, No 1 (2019). DOI: <https://doi.org.10.5296/csbm/v6i1.14942>

Submissions to Peer Reviewed Journals – Pending

- **Title:** *The Ethical and Moral Reasoning Ability of Accounting Majors Attending a Faith-Based Institution*

Submission Date: September 25, 2019

Manuscript ID: CJME-2019-0163

Peer Reviewed Journal: The Journal of Moral Education

Second Submission: October 23, 2019

Peer Reviewed Journal: Issues in Economics and Business Journal

Title: *The Best Course of Action (Case Study in Ethics)*

Second Submission: August 2019, London Journals Press

Peer Reviewed and Approved for Publication August 21, 2019. Fee and publication pending.

Submission to be removed.

- **Title:** *A Case for Company Sponsored Community Service*

- Coauthored with Dr. Raymond Rash, St. Leo University
SECRA Presentation Date: February 27, 2020

- **Title:** *Using High Student Interest Innovations in an Accounting Classroom*

- Coauthored with Dr. Timothy Wiseman and Dr. Patricia Wiseman
- Pending submission

SCHOLARSHIP (Continued)

The Best Course of Action – SECRA 2017. Presented a case study that I designed to be able to utilize in Advanced Audit, Audit, and or PHI 7342 ORM classes.

How to Build a Strategic Alliance between Financial Professionals and CPA Firms – Chris Riddle, Blue Ocean Wealth Management, July 2018, Eric Tom – Blue Ocean – 2022/2023

The Effects of the Tax Act of 2018 – Eric Tom, Mass Mutual, January 2019

A Day in the Life of Your Special Needs Child - Special Needs Planning – MetLife 2007

Protecting your Estate through the Use of Trusts – Charter Oak Financial, February 2016

Charitable Giving – Tax Benefits of Setting up Charitable Trusts - NY Life, May 2008

Succession Planning for Private Entities – August 2019, Robert G. Federici, Esquire, Hudson Wealth Management

Conflict Diamonds and Corporate Social Responsibility in the U.S. Jewelry Industry. Paper presented at the Santa Fe Symposium, Albuquerque, NM, by Dr. Robert Previti - 2018

The Need to Overhaul the Tax System, Saint Leo University – April 2016

Dissertation Proposal Defense - Saint Leo University, April 2018

Final Proposal Defense - Saint Leo University, March 2019

Not-for-Profit Board Presentations – A Primer for Board Members

- Changes to Form 990, Self-Interest Discussion (1985-2024)
- Financial Statement/Management Letter Presentations as Audit Partner/Consultant(1985-2024)

Public Broadcast Television (Diskette Available Upon Request)

Planning for your Special Needs Child – An Interview with Louis P. D’Elia, CPA on PBS, Staten Island. Runs sporadically in perpetuity, Richmond County

Editor/Dissertation and Manuscripts

- *Editor* for Robert Previti. Dissertation Title - Effectiveness of the Kimberley Process and Corporate Social Responsibility in the U.S. Jewelry Industry (2016)
- *Editor* for Ray Rhash. Dissertation Title - The Influence of Performance Management on Profitability and Employee Turnover of Rural Electric Cooperatives (2019)
- *Editor/Coach* for Richard Gunter Dissertation Proposal (September 2019)

Other Scholarship

- Tax newsletter from CPA firm as a Managing Member
 - Annual Firm Gatherings on Tax Law Changes
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SCHOLARSHIP (Continued)

- Bi-Annual Seminars (2020 through 2024) – The Effects of COVID—19 and Funding Available
- Annual Seminars – Tax Changes – Federal and State
- Not-For-Profit Accounting – A Primer for Board members
- CPA Review Consultant
- Accounting Manual and Employee Handbooks – Manufacturing Industry
- CFO Trainer and consultant
- Tax Update for Seniors – Annual pro-bono tax seminar
- Retirement Planning – How Much Savings Do You Really Need
- Conference on Diamond Mining in Non-Conflict Countries

Current Research Topics of Interest

The CPA and the Tax Lawyer

- Case studies in Tax and Accounting
 - ^ The CPA as Outside CFO
- Where have all the Accounting majors gone? An analysis of the current shortage.
- Wearing two hats – The CPA and the Professor – An increasingly rare combination.
- Is the Small CPA Firm a Thing of the Past?
- Pandemic Funding – A Case of Need vs. Greed

PROFESSIONAL LICENSES

All Licenses Limited to the State of New York
Certified Public Accountant, State of New York
Notary Public, State of New York
NASD Series 6
NASD Series 63
Life and Health License

MEMBERSHIPS AND AFFILIATIONS

Member: American Institute of Certified Public Accountants; NYS Society of Certified Public Accountants; NY Independent Accountants Association - Brooklyn Chapter, NY Independent Accountants Association - Staten Island Chapter, National Association of Professional Agents.

Formerly Multiple Year Member – NAIFA, NALU and Million Dollar Round Table, International Management Association, National Society of Public Accountants, National Ethics Association.

Financial Planner, Special Needs Planning Group (Met Life), Advanced Estate Planner, Long-term Care Certified – Shore Road Financial Group

COMMUNITY SERVICE

- Actively involved with youth as manager, coach and coordinator for various athletic leagues
 - Provide Pro bono tax and consulting services various underserved populations
 - Active and life-member of Cathedral Club
 - Served on school and NPO boards
 - Recipient of Pillar of Community Service Award for state and local NPO organization servicing underserved population (Revenues of \$50 million)
 - Pioneered fund-raising drives to support local initiatives
 - Act as specialist in financial strategies for families with special needs children
 - Nominated for King of Kings (County) Award
 - Presidential Club Donor
 - Pro bono accountant for NPO foundation for medical research
 - Tutor – Elementary school to doctoral level (pro bono)
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