Barry L. Holland, MS Tax, MBA, CPA

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PROFESSIONAL EXPERIENCE

2018 -- present
Wright State University (Raj Soin College of Business) – Instructor

Teach undergraduate Accountancy classes using in-person and synchronous online formats, and graduate Accountancy class using asynchronous online format

Classes taught:

- ACC 2010, Accounting Principles I (Intro Financial Accounting)
- ACC 2020, Accounting Principles II (Intro Managerial Accounting)
- MBA 5100, Survey of Accounting

Tools used include Brightspace D2L, WileyPlus Next Gen, McGraw Hill Connect, Blackboard Collaborate Ultra, Panopto, Respondus LockDown Browser & Monitor

Also consulted with Bursar and Controller offices on tax reporting matters affecting the university

2006 – present
Barry L. Holland, CPA, PLLC -- Owner

Small practice to prepare annual tax returns for individual and business clients

2016 -- 2018
University of Cincinnati (Lindner College of Business) – Adjunct Instructor

Taught graduate-level Accounting classes using asynchronous online format in Blackboard. Done simultaneously with full-time employment as Director, Business Affairs (Tax Compliance).

Named to the college's ***Dean's List for Teaching Excellence*** in multiple terms

2000 – 2018
University of Cincinnati -- Director, Business Affairs (Tax Compliance)

- Primary interpreter/expert on tax matters for the University
- Managed federal tax compliance for $1B portfolio of tax-exempt debt
- Managed unrelated business income tax (UBIT) compliance; Prepared annual Form 990-T tax return
- Prepared annual information returns including:
    - Forms 1098-T, tuition reporting to students (80,000 per year)
    - Forms 1099-MISC, compensation reporting to contractors (2,000 per year)
    - Forms 1042-S, income and tax reporting to nonresident alien students, employees and contractors (500 per year)
    - Forms 1099-K, payment card reporting to 100 merchants accepting Bearcat Cards
    - Forms 1099-C, cancellation of debt reporting to former students
    - Canadian Form TL11A, tuition reporting to Canadian students (150 per year)
- Mentored graduate students in semester-long internships; Graduated mentees now work for EY, PwC, IRS and law firms
- Educated students and parents on tuition tax reporting requirements and options
- Spoke to student group leaders on issues affecting them, including Employer ID Numbers, applying for tax-exempt status, and sales tax
- Defended University against 4 IRS audits -- two tax-exempt debt audits and one UBIT limited-scope audit with No-Change results, also one 403(b) plan audit with favorable settlement
- Responded to hundreds of annual inquiries from students/families, vendors and international students/visitors
- Managed Compensation vs. Scholarship/Fellowship analysis; Determined proper payment method and reporting of various payments to students and other academic participants
- Managed employee vs. independent contractor determinations; Approved Personal Service Contracts (1000 per year) as primary delegate of Office of General Counsel
- Reviewed and approved various contracts (500-1000 per year) for compliance with tax-exempt debt, UBIT and compensation requirements
- Advocated for tax legislation and positions favorable to student and University interests
- Consulted frequently with HR/Benefits and Payroll managers; Determined proper treatment of payments to employees including high-profile personnel
- Managed nonresident alien tax withholding and reporting; Analyzed situations and determine proper application of international tax treaties

- Developed global tax compliance program for University and expatriate employees, with assistance from Big-4 firm
- Oversaw annual Form 990 / 990-PF for related nonprofit entity
- Prepared monthly Ohio sales tax returns
- Led team of US higher-ed professionals consulting directly with Canada Revenue Agency to help CRA develop instructions and publications for colleges outside Canada

2000
Northern Kentucky University -- Adjunct Instructor

Taught undergraduate Accounting night class on federal income tax for individuals. Done simultaneously with new full-time employment at UC

1998 – 2000
Comair, Inc. -- Tax Analyst

Prepared consolidated federal and state/local income and franchise tax returns, and managed state income and sales tax audits for regional airline

1994 – 1998
Anacomp, Inc. -- Senior Tax Accountant

Prepared consolidated federal and state/local income and franchise tax returns, extensions and estimates for international micrographics company

1991 – 1994
Holland Tax & Financial Services -- Owner

Prepared federal and state returns for individuals, corporations and partnerships

1988 – 1991
Internal Revenue Service -- Revenue Agent

Planned and conducted audits of individual, corporate and partnership returns; Researched code, regulations, cases, rulings and other sources

PUBLICATIONS & PRESENTATIONS

"Tax Update 2016," co-presenter at Central Association of College & University Business Officers (CACUBO) Annual Meeting, San Francisco CA, October 2016

"Student Groups and Tax ID Numbers," presenter in Student Activities & Leadership Development session, University of Cincinnati, February 2014

"Understanding Form 1098-T," published in *The Tax Adviser* magazine by American Institute of Certified Public Accountants (AICPA), Vol. 38, Issue 2 -- February 2007

"Proper Classification and Reporting of Scholarships, Fellowships and Stipends: One University's Approach," co-presenter at National Council of University Research Administrators (NCURA) Annual Meeting, Washington DC, November 2006

"Surviving an IRS Audit," panel presenter at National Association of College and University Business Officers (NACUBO) Unrelated Business Income Tax Forum, New Orleans LA, February 2003

"Unclaimed Property Reporting," co-presenter at Regional Airline Association Annual Meeting, Phoenix AZ, 1999

SERVICE TO UNIVERSITY

Dean's ad hoc Online Instruction Committee – chosen to represent Accountancy Department in developing improved standards for faculty, 2020-present

Undergraduate Curriculum Committee – elected by faculty to departmental committee, 2019-present

Diversity & Inclusion Committee – volunteered on departmental committee to promote learning and action to assist minority and vulnerable communities, 2017-2018

University Research Council – served on faculty subcommittee to review and judge student/faculty proposals for internal fellowship funding, 2008-2011

Helping Hands – annually assisted incoming students (and their families) with moving into UC residence halls, 2006-2017

EDUCATION & ACTIVITIES

Master of Science in Tax, University of Cincinnati, 2017
Master of Business Administration, Indiana University-Kokomo, 1997
Bachelor of Science in Accounting, Ball State University, 1988

Member of American Accounting Association including sections for Teaching, Learning & Curriculum, Financial Accounting & Reporting, Government & Nonprofit Accounting, Management Accounting, and Taxation, 2019-present

Treasurer for local nonprofit organizations, 2002-2004, 2008-2013
Actively play trombone and bass guitar; now learning flute