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DISTINGUISHED ACCOUNTING AWARDS

First Annual Breakfast of Champions

February 14, 2019
The Merchants Exchange Club

AGENDA

7:15 a.m. **Registration & Networking**

8:00 a.m. **Welcome Remarks**

Nanette Lee Miller, B.A. '71
Retired Partner, Marcum LLP

Presentation of Awards

Dr. Yim-Yu Wong, Interim Dean, College of Business, presents:

Community Champion Award

Nanette Lee Miller, B.A. '71, Retired, Marcum LLP

Outstanding Public Accounting Award

Donald Endo, B.A. '81, The Exec Ranks

Dr. Amy Chang, Chair, Department of Accounting, presents:

Corporate Partner Award

Moss Adams LLP

Distinguished Service Accounting Professor Award

Jiunn Huang, Ph.D., Professor Emeritus

Joanne Duke, Ph.D., Professor Emerita

Okorie Ramsey, B.S. '92, Vice President, Finance Compliance Officer & SOX.

Kaiser Foundation Health Plan, Inc. and Hospitals. CalCPA Education Foundation, Board of Trustees (President 2017-2018), presents:

Lifetime Achievement Award

Loretta Doon, M.A. '73, CEO, CalCPA and CalCPA Education Foundation

Tina Caratan, CPA, Accounting Lecturer, and

Najma Malik, President Beta Chi Chapter, presents:

Honorary Member to Beta Alpha Psi

Loretta Doon, M.A. '73, CEO, CalCPA and CalCPA Education Foundation

9:15 a.m. **Keynote Speaker**

Jennifer Cabalquinto, CFO, Golden State Warriors

9:45 a.m. **Closing Remarks and Acknowledgments**



COLLEGE OF BUSINESS

San Francisco State University
1600 Holloway Avenue
San Francisco, CA 94132

San Francisco State University
Downtown Campus
835 Market Street, 6th Floor
San Francisco, CA 94103

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Your investment in San Francisco State University offers students the opportunity to become change agents in their own and their families' lives, diversifying and strengthening our communities and California. SF State graduates are bold — they bring their unique perspectives to their careers and become innovators, inventors, responsible leaders, and social reformers, and are an economic engine that drives achievement and prosperity.

The College of Business at San Francisco State University has been a leading institution of business education in the San Francisco Bay Area for over 50 years, preparing students to succeed in a global economy. We have about 120 Ph.D.-qualified faculty and 80 adjunct faculty, most with prior or current business experience. As scholars and practitioners in their disciplines, our outstanding faculty provides students with important knowledge, valuable insights, and practical skills.

For information on ways to give, contact Manny Nungaray, Executive Director of Development, at (415) 405-2655 or email at manny@sf.edu



Keynote Speaker

Jennifer Cabalquinto
CFO, Golden State Warriors

Jennifer Cabalquinto is the chief financial officer of the Golden State Warriors. In this role, she oversees all day-to-day and long-term financial planning, accounting and treasury operations for the organization. She is also responsible for the planning and leadership of IT and facilities departments.

Jennifer has over 25 years of finance leadership experience in a variety of startup, turnaround, stable and high growth business enterprises.

Jennifer serves on the Boards of the Boys and Girls Club of Oakland, Alameda County Community Food Bank and is on the audit committee for Leadership Education for Asian Pacifics (LEAP). She is also on the advisory board for San Francisco State University's College of Business and S.U.N.Y Binghamton's School of Management. Beginning January 2019, Jennifer will also serve on the Board of the San Francisco Chamber of Commerce.

Jennifer earned a bachelor's degree in Accounting from SUNY, Binghamton's School of Management.



We would like to acknowledge and thank the following individuals for their contributions:

Jennifer Cabalquinto

Tina Caratan

Amy Chang

Dominic Decarlo

Charlene Del Muro

Sandra Henao

Nanette Lee Miller

Ken Maeshiro

Manny Nungaray

Arianna Pruett

Okorie Ramsey

Yim-Yu Wong

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Provides direct scholarship support to accounting students towards their financial aid.

Accounting Fund

This fund will provide the support to the Accounting Department and the Center for faculty research, faculty release time to energize programs and projects, professional development, student organizations, speaker engagement events, and the cost for professional organizations membership dues.

Volunteer Income Tax Assistance (VITA) Program

VITA is a national program providing free assistance to low income, elderly, limited English proficiency and disabled individuals who require assistance in preparing their tax returns. The concept, as originally designed, was to provide local taxpayers with free tax return preparation by accounting students, an effort to provide both a valuable community service and a powerful hands-on learning experience for the accounting students. The program received top national honors in 2016 and 2017.

Make a gift today at cob.sfsu.edu/accounting/center or contact Manny Nungaray, Executive Director of Development at manny@sfu.edu on ways to give.

LIFETIME ACHIEVEMENT AWARD



Loretta Doon, CPA

**CONGRATULATIONS
AND THANK YOU, LORETTA!**

Few have had more
of an impact on CalCPA
and the CPA profession.

Sincerely,
your CalCPA Family



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 for receiving the Lifetime Achievement Award!



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San Francisco State University
 College of Business congratulates
all Honorees
 for their achievements!



SAN FRANCISCO STATE UNIVERSITY

SF State Foundation congratulates
Don Endo
 for receiving the
 Outstanding Public Accounting Award!



Nanette Lee Miller
 Community Champion Award

Nanette Lee Miller (B.A., '71) is a native San Franciscan, who was raised in the Marina District and graduated from San Francisco State University in June 1971. She has spent her entire career in the SF Bay Area in public accounting and consulting. She has worked for local, regional and an international CPA firms, starting when attending SF State and retiring 12/31/18 from Marcum LLP. She has been primarily in the assurance side of the business with strong tax and consulting emphasis. Industries served have been healthcare, finance and technology. She has been active in community and faith based not for profits over the same time frame being a sought after board member and officer. She enjoys local and international travel with a 2nd home in Argentina.



Donald Endo
 Outstanding Public Accounting Award

Upon his graduation from SFSU, Donald Endo (B.A., '81) joined the international accounting firm of Laventhal and Horwath and was a member of the tax group from 1981 until 1990 when the firm merged its practice with BDO USA, LLP, where in 1985, Don became a partner in their tax practice.

In 1986, Don joined QAG, Inc. as their CFO, where he provided financial and tax oversight. Don also served as a member of the Board of Directors of companies held within the organization, including Credit One Bank, and served as chairman of the audit committee. In 2013, Don returned to BDO USA, LLP as Managing Director in the tax group, where he served as a tax adviser to corporate, venture capital and private equity clients. In addition, Don was the Core Value Champion for the San Francisco office tax group, providing leadership and mentoring within BDO's National Core Value Leadership program.

Don has served as a director on the Community Advisory Board for Wells Fargo Bank in the Bay Area market. Currently, Don is an active member of the San Francisco State University Foundation and serves on the Foundation's audit committee.



Moss Adams LLP
 Corporate Partner Award

Moss Adams is a fully integrated professional services firm dedicated to growing, managing, and protecting prosperity. With over 2,900 professionals across more than 25 locations in the market capitals of the West and beyond, we work with the world's most innovative, dynamic, and promising clients and markets. Through a full spectrum of accounting, consulting, and wealth management services, we bring the deep industry specialization and inspired thinking our mid-market clients seek.

Since we put down roots in the Pacific Northwest more than 100 years ago, we've steadily expanded to serve clients not only in the West, but also across the nation and globally. Our full range of services includes accounting (assurance and tax), consulting (IT, strategy & operations, transactions, and specialty), as well as individual and institutional wealth management.

Moss Adams is one of the 15 largest US accounting and consulting firms and a founding member of Praxity, aisbl, a global alliance of independent accounting firms providing clients with local expertise in the major markets of North America, South America, Europe, and Asia.



Jiunn Huang, Ph.D.

Distinguished Service
Accounting Professor Award

Dr. Jiunn C. Huang, Emeritus Professor of Accounting, joined San Francisco State in 1986 and retired in 2018. His primary teaching areas were cost accounting and international accounting. He published numerous articles in accounting education and financial reporting. Jiunn served as department chair for 19 years, effectively making committee assignments to accomplish department functions, such as RTP, hiring, and curriculum development. He actively engaged students beyond the classroom through student organizations. Jiunn regularly conducted outreach to accounting professionals and alumni to build strong ties, resulting in more students being hired and increased scholarship opportunities. During his tenure as chair, donations and contributions from firms and individuals were the highest in the history of the accounting department.



Joanna Duke, Ph.D.

Distinguished Service
Accounting Professor Award

Prior to serving as the Faculty Director of Graduate Business Programs, Jodi Duke served as Acting Associate Dean of the College of Business during the 2011 to 2012 academic year. While director of the Master of Science in Accountancy program, the MSA program grew from about 15 students in 2010 to almost 100 in 2013. Duke joined the department of accounting in 1987 after earning her Ph.D. from The Pennsylvania State University. Her primary teaching area is financial accounting and has taught courses from basic financial accounting, theory, and advanced topics. She has received a number of awards for teaching, advising and research. She has published widely on a variety of topics including bond covenants and the impact on accounting choice, financial effects of leasing arrangements and attributes affecting academic success. Her articles have appeared in several highly ranked journals including Journal of Accounting and Economics, Journal of Business, Finance and Accounting, Journal of Education for Business, and Advances in Accounting, among others. One article was reprinted as a chapter in the book "The Economics of Accounting Policy Choice". Duke retired from San Francisco State University in January 2018.



Loretta Doon

Lifetime Achievement Award

Loretta Doon (M.A., '73) began her executive role with CalCPA and the Foundation in 2005 as Chief Operating Officer (COO) and was named CEO of both organizations in May 2006, marking the first time in CalCPA's history that a CPA has held the CEO position. She began her career as a controller for an insurance company, followed by three years as an auditor at Ernst & Young.

Loretta went on to spend more than 25 years as the associate executive director of the California Teachers Association. She is also a former teacher. Loretta is recognized for her many achievements as head of CalCPA and the Foundation, including surpassing a record-setting 45,000 in membership and purchasing their headquarters building in Burlingame. She has been named one of Accounting Today's Top 100 Most Influential People in Accounting numerous times. Doon was also the chief architect for constructing a platform that attracted 53 education partners across the country, including 48 state CPA societies, 4 associations, and 1 national CPE vendor.

Deloitte.

Making a real impact

We are proud to honor Loretta Doon for this Lifetime Achievement Award. Her commitment and longtime contributions have made a significant impact to the accounting profession.

Congratulations on this Distinguished Accounting Award!

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Congratulations to Nanette Lee Miller, CPA Adviser to the San Francisco Bay Times



...and also to Loretta Doon, Donald Endo,
Jiunn Huang, Joanne Duke and Moss Adams, LLP
Distinguished Accounting Awards 2019

