

JOAN A. KITUNEN, FCPA, FCA

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SUMMARY

I am a member of CPA Canada, a Fellow of the Institute of Chartered Accountants of Ontario (FCA), and a member of the accounting faculty at the Rotman School of Management at the University of Toronto and the management faculty at the University of Toronto Mississauga. My expertise is in Canadian Income Taxation. I have received numerous teaching awards, including the Roger Martin and Nancy Lang Award for Excellence in Teaching, the Provost's Merit Award, the Dean's Excellence Award, the MMPA Teaching Excellence Award, and numerous Rotman Excellence in Teaching Awards. As well, in 2012 I received the *CICA Award for Excellence in Income Tax Practice and Education for Outstanding Contribution to the Profession and the Canadian Tax Community*.

I am one of two Directors of the CPA/Rotman Centre for Innovation in Accounting Education (2004 – 2017). I was involved in the development of curriculum and supporting materials for the Elective Module in Taxation, forming part of the new CPA Professional Education Program. I was the academic coordinator of the taxation segment of the Chartered Professional Accountants of Ontario (ICAO) School of Accountancy from 1999 until its completion in 2014, a member of the CICA Tax Courses Committee (2003 – 2012), and a member of the CICA Tax Education Task Force (2008 – 2013). Prior to joining the faculty at the University of Toronto, I was a Tax Partner at Deloitte.

I am the co-author of the text entitled *Canadian Income Taxation, Planning and Decision Making*, by Buckwold and Kitunen.

WORK EXPERIENCE

Associate Professor, Teaching Stream, Rotman School of Management, University of Toronto, and University of Toronto Mississauga (July 2015 - present)

Senior Lecturer, Rotman School of Management, University of Toronto and University of Toronto, Mississauga (July 1995 - June 2015); and Lecturer (July 1990 - June 1995)

Partner, Deloitte & Touche - one of Canada's leading accounting firms, until July 1990 when joined the accounting faculty at the University of Toronto.

PROFESSIONAL CERTIFICATION

Chartered Professional Accountant (FCPA, FCA) (since 2013)
Fellow of the Institute of Chartered Accountants of Ontario (FCA) (since 2006)
Chartered Accountant (CA) (since 1978)

TEACHING

COURSES TAUGHT

RSM 324 Canadian Income Taxation I (3rd year course, Rotman Commerce)
RSM 424 Canadian Income Taxation II (4th year course, Rotman Commerce)
MGT 423 Canadian Income Taxation I (4th year course, UTM Commerce)
MGT 429 Canadian Income Taxation II (4th year course, UTM Commerce)
MGT 2206 Taxation I (1st year course, MMPA)
MGT 2207 Taxation II (2nd year course, MMPA)
MGT 2208 Taxation III (final semester course, MMPA)
RSM 2204 Taxation & Decision Making (2nd year elective course, MBA)
RSM 4320 Advanced Accounting Topics for Finance (MFIN)

COURSE COORDINATION & STAFFING

I co-ordinate and staff the undergraduate taxation courses at the Rotman School.

COURSES DEVELOPED

- MGT2283A Integration and Professional Decision Making, developed with Abraham Iqbal for the final semester of the MMPA to meet the new CPA requirements. The course ran for the first time in summer 2015 and received great reviews by the students.
- Advanced Taxation, developed with Abraham Iqbal for the Graduate Diploma in Professional Accounting. The course will be offered for the first time in summer 2016.
- MGT 2208 Taxation III (final semester course, MMPA). This course is case based and examines many of the tax issues, problems and planning opportunities professional accountants encounter in providing tax services to taxpayers.
- MGT 2204 Taxation and Decision Making, developed in 2009 for MBA.
- MGT 4320 Advanced Accounting Topics for Finance, developed with Professor Rotenberg in 2008 for MFIN. The course integrates accounting and tax aspects of corporate reorganizations and international business activities. The course was offered 2008 through 2013.

TEACHING AWARDS

Rotman Excellence in Teaching award (B.Com)
Rotman Excellence in Teaching (MBA)
Rotman Excellence in Teaching (MFIN)
MMPA Teaching award
Provost's Merit award
Dean's Excellence award
Roger Martin and Nancy Lang award for Excellence in Teaching

PUBLICATIONS

Canadian Income Taxation: Planning and Decision Making, by Buckwold & Kitunen. A new edition of the text is published annually by McGraw-Hill Ryerson. The 2016–2017 edition was published in July, 2016 and the 2017-2018 edition is scheduled to be published in July 2017.

A Report of the Tax Education Task Force, by Ian Sherman, (E&Y), Bruce Ball (BDO), Frank Colantonio (CICA), Joan Kitunen (UofT), and Ken Laloge (MacKay), published by CICA, October 2009.

SERVICE ACTIVITIES

Director, CPA/Rotman Centre for Innovation in Accounting Education (2004-2017)

Divisional Representative, UTM Academic Appeals Committee (2010-2017)

Member of three-year Review Committee for Abraham Iqbal (2016)

Member of Rotman Commerce Accounting Specialist Curriculum Review Committee (2016-2017)

External Reviewer, Humber College Accounting Diploma and Advanced Diploma programs (2016)

Presenter, IMI Awards Night and Director's Circle Reception (2016)

Member, IMI Awards Selection Committee (2016)

Member of MMPA Curriculum Committee (2013-2017)

Member of Rotman Accounting Curriculum Committee (2013-2015)

Member of UTM working group for the development of the 12-month MMPA program (2013-2015)

Member of Rotman working group for development of the Graduate Diploma in Professional Accounting (2015)

Member of Rotman Promotion Committee, for promotion of M. Khan to Senior Lecturer (2013)

Member of Rotman Three-year Review Committee for Lisa Harvey (2013)

Dean's Representative on the UTM Search Committee, for a lecturer in mathematics in the Department of mathematical and Computational Sciences (2012)

Member of Rotman Teaching Evaluation Committee, for promotion of Dragan Stojanovic to Senior Lecturer (2012)

Member of the UTM Search Committee, for the UTM Department of Management Chair (2010)

Member of UTM Teaching Evaluation Committee, for promotion of Catherine Seguin to Senior Lecturer (2010)

Member of UTSC Promotion Committee, for promotion of George Quan to Senior Lecturer (2009)

Member of UTSC Promotion Committee, for promotion of Liang Chen to Senior Lecturer (2009)

Member of the UTM Convergence Institute Working Group Committee (2009).

Chair of the Accounting Area Task Force - Competency Based Approach to Accounting Education (2002-2003)

Vice – Director of Commerce Programs (2001-2002)

PROFESSIONAL ACTIVITIES AND AFFILIATIONS

- *Member of the In Depth Tax Year 3 Project - Review Committee, Chartered Professional Accountant of Canada (2015-2017)*
- *Invited Guest, CPA Convocation Celebration (2016)*
- *Co-lead author for the development of curriculum and supporting materials for the initial offering of the Elective Module in Taxation for the CPA Canada Professional Education Program (2013-2014)*
- *Reviewer of course material for the tax module in the CPA Canada Prerequisite Education Program (2013-2014)*
- *CPA Accreditation Review Team member for an Ontario University accreditation review (2013-2014)*
- *CPA Ontario advisory group member. The objective of the advisory group is twofold. First, to provide feedback on the CPA competency map from an Ontario Academic perspective and second, once familiar with the new CPA competency map, to provide input to the ICAO on how the new CPA Certification Program might best be incorporated into our current University/Institute delivery partnerships (2013-2015)*
- *Academic Coordinator, ICAO School of Accountancy – Taxation segment. The position involves working closely with the ICAO to plan the taxation segment of the School, overseeing the preparation of course material, hiring and training taxation instructors, and overseeing the delivery of the taxation education at the School (1999 to 2014)*
- *Co-Author and Reviewer, ICAO School of Accountancy taxation material (1999 to 2014)*
- *Member, CICA Education Task Force. The mandate of the Education Task Force is to develop the framework and architecture for tax-related educational programs to be developed for, and delivered to Canadian tax practitioners over the next ten years. The first meeting of the task force was held April 14, 2008. A report of the task force was published by the CICA in October 2009.*
- *Academic representative, CICA Tax Courses Committee. This committee is responsible for the planning, content and faculty for the In-depth Tax Program and other specialized taxation courses delivered by the CICA to accountants specializing in taxation across the country (2003 to 2011)*
- *Member, CMA Ontario Licensure Exam Review Panel (2011)*
- *Member, CMA Ontario Public Accounting Fair Pass Panel (2011)*
- *Guest Lecturer, CICA In-depth Tax Program (Fall 2004 through 2011). Three hour lecture entitled Facilitation of Small Groups given twice a year, once in Calgary and once in Toronto.*
- *Member, CICA Tax Courses Committee Strategy Session held at the Millcroft Inn, Caledon, two-day session in fall 2007.*
- *Member, three-person subcommittee of the CICA Tax Courses Committee, responsible for overseeing of the update to the Tax Research Module in the first CICA In-depth tax course (2007)*
- *Invited Guest, ICAO Honour Roll Luncheon, Convocation Ceremony and Dinner Dance (2004–2006, 2008-2010)*
- *Lecturer – ICAO School of Accountancy (1986 – 1998)*
- *Member, Canadian Tax Foundation*
- *Member, Chartered Professional Accountants of Canada*
- *Member, Chartered Professional Accountants of Ontario*
- *Member, Chartered Professional Accountants of Ontario University Faculty Colleague Program*
- *Member, Deloitte Alumni Association*

HONORS AND AWARDS

CICA Award for Excellence in Income Tax Practice and Education for Outstanding Contribution to the Profession and the Canadian Tax Community (2012)

Fellow of the Institute of Chartered Accountants of Ontario – elected a Fellow of the Institute in 2006 in recognition of outstanding career achievements and leadership contributions to the community and to the profession.

EDUCATION

Taxation specialist, CICA In-depth Tax Program (completed in 1982)

Chartered Accountant, Canadian Institute of Chartered Accountants (1978)

Bachelor of Business Management, Ryerson University (1977)