

Olivia N. Davis, CPA

EDUCATION

DePaul University, Chicago, IL

Doctor of Business Administration, in progress expected completion June 2025, GPA 4.0

University of Kentucky, Lexington, KY

Graduate Certificate in Fundraising and Development, in progress; expected completion in December 2024

University of Kentucky, Lexington, KY

Graduate Certificate in College Teaching and Learning, in progress, 3 course completed August 2019 - May 2020, 2 courses completed August 2022 – May 2023; expected completion May 2024, GPA 4.0

University of Kentucky, Lexington, KY

Master of Science Accounting, Dec 2004, GPA 3.9

University of Kentucky, Lexington, KY

Bachelor of Science Accounting, Dec 2003, GPA 3.2

CERTIFICATIONS

Certified Public Accountant, Kentucky, 2006

Certified Public Accountant, Ohio, 2007

WORK EXPERIENCE

UNIVERSITY OF KENTUCKY, Von Allmen School of Accountancy, Lexington, KY

Lecturer – January 2018 – Present

Primary courses include:

ACC 301: Intermediate Accounting I, ACC 302: Intermediate Accounting II, ACC 403: Auditing, ACC 200: Intro Accounting for Decision Makers

Design and deliver courses including:

- Developing course objectives and instructional methods
- Preparing syllabi, supplemental course materials and assessments and delivering them to students
- Recognizing individual differences in the classroom and adapting instructional techniques accordingly
- Responding to instructional needs of students and adjusting delivery methods to improve student outcomes

Faculty advisor for UK Student Chapter of NABA: Minority Business Professionals

- Assist students in identifying speakers for meetings
- Assist students in chapter effectiveness
- Present opportunities for scholarships and employment for students
- Coordinate program offerings

Developed mentoring program for students in public accounting internships as well as numerous networking and mentoring opportunities for students that also include alumni engagement

Worked cooperatively to develop Executive Education offerings by the Gatton College

Developed and delivered custom education solution for director level employees at Valvoline on topics of financial accounting, cost accounting, and business decision making

Completed numerous prospective student recruiting events including events focused on DEI initiatives

Collaborated on numerous community projects in Lexington and throughout the state

Nominated and selected for: “Gatton College of Business and Economics Teaching Excellence Award”, “Gatton College of College of Business and Economics Faculty of the Year”, “University of Kentucky Outstanding Teaching Award”, “University of Kentucky Alumni Association Great Teacher”

Associate Director of the Von Allmen School of Accountancy – August 2021 – Present

Assisted the Director on the completion of high-level administrative tasks

Worked with Von Allmen School of Accountancy Advisory Board to form committees focused on areas of impact for students, faculty, alumni, and other stakeholders

Increased Von Allmen School of Accountancy outreach to current students by planning events in collaboration with student leaders in the School focused on accounting career opportunities and CPA exam planning

Instructor, College Business Management Institute, July 2023

Instructor for Fundamentals of Accounting to approximately 350 first year CBMI participants

UNIVERSITY OF DAYTON, Dayton, Ohio

Adjunct Instructor – October 2017 – February 2019

Performance Measurement and Control Systems Perspective (MBA 792)

Facilitate delivery of MBA@Dayton curriculum including:

- Hosting weekly synchronous meetings
- Engaging with students through technology platform Adobe Connect
- Ensuring objectives of synchronous meetings are met as well as ensuring appropriate progress is made on asynchronous content by students
- Evaluating student performance through exams, quizzes, participation during synchronous meetings, and final course reflection paper

SULLIVAN UNIVERSITY, Lexington, KY

Adjunct Professor Accountancy - June 2017 – December 2017

Auditing (Audit I) – June 27, 2017 – September 5, 2017

Advanced Auditing (Audit II) – September 26, 2017 – December 12, 2017

Design and deliver courses including:

- Developing course objectives and instructional methods
- Preparing syllabi, supplemental course materials and assessments and delivering them to students on a timely basis
- Recognizing individual differences in the classroom and adapting instructional techniques accordingly
- Assisting students in a positive manner to do their best

PRICEWATERHOUSECOOPERS LLP, Lexington, KY, and Cincinnati, OH

Assurance Manager, July 2012 – July 2017

Managed multiple financial statement and internal control audit engagements for private companies of various sizes and various industries including manufacturing, trading, retail, and financial services Supervised and directed audit teams (up to 15), including specialists, during the planning, execution, and completion of audit engagement

Performed technical research related to accounting (US GAAP and IFRS) and auditing topics Actively engaged in recruiting programs including interviewing and talent selection process with a specific focus on diverse talent

Regularly communicated with senior management, executives, boards of directors, and audit committees, written and orally

Served as an instructor and facilitator for numerous technical audit courses

Prepared and completed numerous presentations to a wide variety of audiences on technical topics as well as personal and professional development topics

Participated with partners and senior managers on proposals and business development calls Maintained active communication with clients to manage expectations, ensure satisfaction, and lead change efforts

Consulted, worked with, and serviced client base to make recommendations on business improvement and process improvement and served as a business advisor to clients

Served as a career coach and mentor for multiple staff members
Served as a market-wide leader of diversity initiatives and participated in several national diversity programs

Assurance Senior Associate, July 2008 – June 2012

Ran client engagements from start to finish, which included planning, executing, directing, and completing financial statement and internal control audits
Managed engagement economics and budgets
Worked with audit team to identify and resolve client issues discovered during audit process
Researched accounting and auditing issues utilizing electronic databases
Proactively interacted with key client management to gather information, resolve audit related problems, and make recommendations for business and process improvements.
Participated in recruiting efforts with a focus on diversity recruiting
Maintained a good working relationship with clients to enhance customer satisfaction and worked with client management and staff at all levels to perform audit services
Supervised, trained, and mentored associates and interns on the audit process
Assessed and delivered feedback on the performance of staff assigned to engagement teams

Assurance Associate, January 2005 – June 2008

Performed financial statement audits as well as audits of internal controls for both public and private companies, including domestic and multinational corporations
Developed extensive technical accounting and auditing knowledge
Provided supervision and coaching to and reviewed the work of less experienced team members Interacted daily with client personnel of various levels to facilitate the completion of audit tasks Critically analyzed information, performed various types of testing, and formed conclusions
Developed audit workpapers and client deliverables
Reviewed and evaluated risk, documented, and assessed key controls, documented, and assessed process flows and identified significant accounting issues
Identified and communicated accounting and auditing matters to Senior Associates, Managers, Partners, and client personnel as appropriate

Used multiple computer software tools to assist in the performance of audits including Microsoft Office applications and many firm specific applications
Involved heavily in recruiting activities, including campus events and student conferences

UNIVERSITY SERVICE

Gatton College of Business and Economics Undergraduate Appeals Committee
Gatton College of Business and Economics Teaching Excellence Committee
Developed FAStTrack (Finance Accounting Success Track) program
Developed Gatton Explore
Co-Developed FAB (Finance Accounting Business) Careers with KYCPA
Von Allmen School of Accountancy Undergraduate Studies Committee
Von Allmen School of Accountancy Masters Policy Committee
Von Allmen School of Accountancy Inclusion and Mentoring Committee
University of Kentucky Student Conduct Hearing/Review Board
University of Kentucky Institutional Finance and Resource Allocation Committee
University of Kentucky Faculty Senate
University of Kentucky Faculty Senate Council
University of Kentucky Undergraduate Council

PRESENTATIONS

Student Groups

Beta Alpha Psi University of Kentucky
National Association of Black Accountants, University of Kentucky

National Association of Black Accountants, University of Louisville
Accounting Club, University of Kentucky
Accounting Club, Sullivan University
National Association of Black Accountants, Central Region Student Conferences
PwC Project Belize Financial Literacy and Entrepreneurship Instructor, St. John's Primary Anglican School and Skills Training Academy
NABA Leadership Development Program, "Other Careers in Accounting", Panelist
UK MLK Center Sister Circle Women's Conference, "She's The Man", Panelist
UK Diversity Recruiting Office Presenter for Whitney Young Scholars Program
Von Allmen School of Accountancy "Making It Count" panel moderator
Von Allmen School of Accountancy HIP Conference "ESG and the role of accountants" Panel moderator
Von Allmen School of Accountancy "Careers You Can Count On" panel moderator

Professional Groups, CPE, and Other Training Programs

PricewaterhouseCoopers Assurance Start – CPE Instructor
PricewaterhouseCoopers Senior School 1 – CPE Instructor
PricewaterhouseCoopers Senior School 2 – CPE Instructor
PricewaterhouseCoopers Senior School 3 – CPE Instructor
PricewaterhouseCoopers Aura V6 Associates and Seniors – CPE Instructor
PricewaterhouseCoopers Aura V6 Managers and Partners – CPE Instructor
PricewaterhouseCoopers Select Senior – CPE Instructor and Panelist
PricewaterhouseCoopers OKI Market Diversity Conversations - Panelist
Toyota Tsusho America, Inc. Annual Training – Inventory and IFRS topics – CPE Instructor
Toyota Tsusho America, Inc. Women's Leadership Connection – Confidence – Presenter
Lexington Minority and Women Contractors' Training Program – Financial Statement Basics
Dismas Charities – Financial Literacy for Inmates and Parolees
Valvoline, Inc. Fundamentals of Business Decision Making Course Designer and Synchronous Session Facilitator
College Business Management Institute (CBMI) Fundamentals in Accounting Instructor

EXTERNAL PROFESSIONAL SERVICE

KENTUCKY SOCIETY OF CPAs

Member, 2007 – Present

Board of Directors - Member, 2020 – Present, Chair-Elect 2023-2024; Secretary-Treasurer 2022-2023

Oversee and advise staff on operations and strategy and advocate for CPAs in Kentucky

Currently serving on the Diversity and Inclusion Committee which is comprised of a cross-section of accounting professionals, educators and administrators focused on the identification of needs and the implementation of programs to promote diversity in the accounting profession in Kentucky

NABA, Inc. (fka NATIONAL ASSOCIATION OF BLACK ACCOUNTANTS), Louisville, KY

Member 2006 – Present

Engage in and promote professional networking opportunities

Vice President, 2009 – 2019

Plan and promote NABA events for professionals and students

Maintain and generate partnerships with companies and employers

Connect with and mentor students at universities and colleges throughout Kentucky

Accounting Career Awareness Program, Co-Chair, 2008 - 2018

Recruit talented high school students to attend the one-week campus residency program

Process applications from high school students interested in attending the program

Maintain and generate partnerships with companies and other partners to support the program

Apply for grants and generate other sponsorship opportunities

Schedule events and manage all logistics of the program

Assist in determining the content of case study completed by students during the program

Manage yearly program budget

Identify and manage college students who serve as chaperones for the program

Review and provide input on scholarship applications

Lead planning conference calls
Recruit and manage professionals who serve as program volunteers
Handle most administrative activities including updates to program documents and website (html)
Treasurer, 2007 - 2009
Prepared monthly, quarterly, and annual financial statements and reports Completed tax form 990
Central Region Student Conference Committee, 2006 – Present
Prepare name tags for conference attendees
Serve as on-site technology coordinator Present pre-conference training to students
Identify students and assist in completing scholarship applications

AICPA CIMA (fka AMERICAN INSTITUTE OF CERTIFIED PUBLIC ACCOUNTS)
Member, 2007 - Present

NATIONAL SOCIETY OF BLACK CERTIFIED PUBLIC ACCOUNTANTS, INC.
Member, 2020 – Present

EXPLORIUM OF LEXINGTON BOARD OF DIRECTORS
Board of Directors, Vice President, appointment April 2017 – April 2021; reappointed April 2021- April 2025;
Executive Director Search Committee Chair July 2021-October 2021
Directed search for new executive director; Advised on all aspects of operations including effectiveness strategies related to financial and other management aspects

PROVIDENCE MONTESSORI SCHOOL
Board of Directors, elected June 2021 through May 2024
Govern the school and provide oversight to the heads of school who runs day to day operations of administration, student affairs and other business. Advise on all aspects of school operations and strategy.

KENTUCKY BOARD OF ARCHITECTS
Public Member, Treasurer, Appointed August 2021 through August 2025
Responsibilities of the board include:

- Issue licenses and certificates to individuals qualified under statutory requirements
- Maintain current and accurate information data of regulatory records
- Investigate and evaluate all complaints filed within the Board and ensure proprieties of due process are administered

Additional service on *Licensure Process Research & Development Taskforce*, Nation Council of Architectural Registration Boards

LEEDS CENTER FOR THE ARTS (aka WINCHESTER COUNCIL FOR THE ARTS)
Board of Directors, Treasurer January 2022 through December 2024
Advise and oversee strategies related to financial and other management aspects

FUND FOR GREATER LEXINGTON AT BLUEGRASS COMMUNITY FOUNDATION
Board of Advisors, June 2022 – present
Conduct research on community needs in Lexington and advise on priorities
Evaluate proposals for community improvements and amenities for the benefit of Lexington residents

BOARD OF DIRECTORS KENTUCKY HIGHER EDUCATION ASSISTANCE AUTHORITY, KENTUCKY HIGHER EDUCATION STUDENT LOAN CORPORATION, KENTUCKY'S AFFORDABLE PREPAID TUITION, ASSET RESOLUTION CORPORATION
Board of Directors Member (July 2017 – June 2018, Secretary-Treasurer July 2018 – June 2019, Finance Audit Committee Chair July 2019 – June 2021, Appointment in July 2017 through 2021)

COMMERCE LEXINGTON
Leadership Lexington Class of 2017/2018
Completed “Going Pro” a community project focused on identification of high school students for participation in a series of workshops focused on increasing their business acumen and a series of job shadowing

opportunities with mentors in a variety of businesses; Conducted a series of professional development workshops; recruited students; matched students with mentors; coordinated schedules for student participants and mentors.

ECONOMIC OPPORTUNITY COMMISSION (formerly GOVERNOR'S MINORITY EMPLOYMENT, BUSINESS AFFAIRS, AND ECONOMIC DEVELOPMENT COUNCIL)

Member, Appointment in July 2017 through 2021

Address barriers faced by Kentuckians due to race, sex, linguistics, ethnicity and/or socioeconomic status; conduct studies and compile relevant data about barriers faced by Kentuckians, communicate with state agencies to facilitate access to businesses owned by members of economically disadvantaged groups regarding construction contracts, personal service contracts, and contracts for professional services and commodities; Previous focus areas included labor participation by minority groups, involvement in apprenticeship programs, and advancing minority owned businesses; Advising on Opportunity Zones designations

LYRIC THEATRE AND CULTURAL ARTS CENTER

Board Chair (January 2020 – January 2021) Treasurer (January 2018 – January 2020; January 2021 – March 2021) and Board of Directors Member (April 2017 – March 2021)

Advised on several effectiveness strategies related to financial and other management aspects; created several recurring programs to engage community including “DreamLex: Youth Talent Showcase”

SANDERSVILLE ELEMENTARY PTA

Treasurer, elected July 2017 – 2019

Shark-A-Thon Fundraising Chair July 2017 – 2019

OHIO DEPARTMENT OF EDUCATION FINANCIAL EDUCATION PROGRAM

Content and Curriculum Subcommittee 2008 – 2009

Advised on the content and curriculum for financial literacy courses for students at public schools in the state of Ohio

HONORS AND AWARDS

Kentucky Colonel, 2003

Lyman T. Johnson Diversity Fellowship and Von Allmen School of Accountancy Research Assistant Scholarship, 2004

PricewaterhouseCoopers OKI Market Leadership Award, 2008 and 2009

PricewaterhouseCoopers Chairman’s Award Nominee, 2008

Gatton College Teaching Excellence Award, 2020

Gatton College Faculty of the Year, 2021

University of Kentucky Provost Outstanding Teaching Award, 2021

University of Kentucky Alumni Association Great Teacher Award, 2022