

# BRYAN D. CATALDI, PhD, CPA, MBA

3047 Ridge Top Resort Way - (612) 710/0906 - [bcataldi001@gmail.com](mailto:bcataldi001@gmail.com)

## RESEARCH ACTIVITIES

I use experimental methods to study factors that influence decisions made with accounting information as well develop pedagogically oriented case analyses for practice and education. I use both theory-based as well as applied research to accomplish my research agenda.

## TEACHING ACTIVITIES

I teach Principles of Financial Accounting, Intermediate Financial Accounting 1 and 2, and Advanced Financial Accounting. I have taught courses for both undergraduate and Master's level students. My main area is Financial Accounting. I have a professional background in Corporate and Individual Tax.

## EDUCATION

**Southern Illinois University, Carbondale, IL**

**PhD in Accounting, May 2014**

**Dissertation:** "Risky Business: How Accounting Choice and Risk Disclosure Impacts Seed Equity

Investors' Value Judgments of Private Companies" **Proposed:** June 6, 2013 **Defended:** April, 2014

**Directed by:** Dr. Ed O'Donnell

**Northern Illinois University, DeKalb, IL Master of Business Administration, December 2009**

**University of Iowa, Iowa City, IA Bachelor of Arts, Accounting, May 2002**

## TEACHING EXPERIENCE

**Western Carolina University (2021 – Current)**

- **Accounting 251 Intro to Financial Accounting – FA21 – SP23**

**Butler University, Indianapolis, IN (2014-2021)**

- See Information provided

**Southern Illinois University, Carbondale, IL (2010-2014)**

- □ **Managerial Accounting and Control Concepts- MBA (BA510):** In Progress Fall 2013
- □ **Intermediate Accounting II (ACCT322):** Instructor Spring 2012, **4.6/5.0**, Instructor Fall 2012, **4.3/5.0**, Instructor Spring 2013, **4.4/5.0**
- □ **Principles of Financial Accounting (ACCT220):** Instructor Fall 2010, **5.0/5.0**

**Rock Valley College, Rockford, IL**

- □ **Intro to Debits, Credits, and Special Journals (ATG 106; ATG 107):** Adjunct Instructor – not evaluated

## AWARDS

- □ **J. Michael Cook Doctoral Consortium:** 2013 Deloitte Sponsored Fellowship
- □ **Accounting Behavior and Organizations:** 2011 Midwest Regional Participant

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## PROFESSIONAL EXPERIENCE

**HOME FREE PROPERTY, LLC.** Owner, Pigeon Forge, TN **2021-PRESENT** – Short Term

## Renal Real Estate Property Management

- Owner of \$4+MM in residential rental real estate producing \$550,000 per year in cashflow

- Personally rehabbed and remodeled 9 cabins in the Smoky Mountain region of Tennessee from 2021-2024

- Self-manager, owner and operator

**TRICK SPEED CUTS, INC.**, Owner, Rockton, IL **2007 – 2009** Small racecar performance business developed in 2007.

- ☐ Developed and implemented a business plan resulting in increased sales over its predecessor owner.

- ☐ Increased customer base from sixty to roughly one hundred twenty-five in six months.

- ☐ Developed and computerized an accounting system.

- ☐ Created a comprehensive customer database for direct mailings/marketing.

☐

**MANAGEMENT RESOURCE GROUP**, Rockford, IL **2005 – 2007** Privately held holding company for investment real estate and service based businesses. Duties included:

***Local Union Advertising, General Manager***

Direct all activities to achieve a profitable business operation for a niche advertising business specializing in sign and print advertising. Accountable for sales, marketing, operations, and accounting. Selected accomplishments include:

- ☐ Developed and implemented a successful sales and marketing plan resulting in 5% increase in sales.

- ☐ Managed and produced a pocket directory resulting in \$12,000 in revenue.

- ☐ Computerized Accounts receivable and billing system.

- ☐ Computerized Operations Management System for all ads across seven locations.

***Investquest, LLC, Property Management***

Participate in the property management of a 10,500 sq. ft. strip center and two resort condominiums. Selected accomplishments include:

- ☐ Oversaw the management activities of a 10,500 sq. ft. strip center.

- ☐ Provided financial consulting in the purchase phase. Constructed cost segregation study resulting in \$50,000 additional tax deductions during the initial purchase.

- ☐ Assisted in resolution of tenant relations issues.

***BDC Consulting, President***

Provide tax and financial consulting contract services to businesses. Selected accomplishments include:

- ☐ Seasonal Tax professional for Lindgren, Callihan, Van Osdel, LLP in Rockford, IL for the 2007 tax season.

- ☐ Seasonal Tax professional for RSM McGladrey in Rockford, IL for the 2008 tax season.

- □ Head instructor of “Starting a Small Business” course for Rock Valley College as of September, 2008.

**PRICEWATERHOUSE COOPERS, LLP**, Minneapolis, MN **2001 – 2005** International “Big Four” public accounting and professional services firm servicing Fortune 500 and public entities throughout the world.

***Tax Associate (2002-2005)***

Prepared and reviewed corporate, partnership, and individual tax returns. Clients included large real estate partnership, multi-entity Fortune 500 food processor/distributor, and high net worth individuals. Specific accomplishments include:

- □ Assisted in recruiting, interviewing, and hiring professional staff for the Minneapolis office.
- □ Prepared, reviewed and served as project manager for the third largest real estate construction/development firm in the country.
- □ Managed, from start to finish, a multi-entity, public, consolidated tax project while managing two tax staff.

***Audit Intern (6/2001-8/2001)***

- Conducted audits on a broad range of public entities to determine GAAP compliance.

Reviewed contracts, leases,

and business covenants. Selected accomplishments include:

- Performed audit procedures on a private software development company in connection with their IPO

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**Publications**

Cataldi, B. D., Sander, J. F., Kelly, A. S., & Callahan, B. (2017). Cutting Through the Numbers: How Data

Mining Was Used to Uncover Multiple Frauds in a Hospital System Medical Center. *Journal of Forensic and Investigative Audit*, 9(3), 936–940.

Terando, W. D., Cataldi, B.D., & Mennecke, B. E. (2018). Impact of the IRC Section 475 Mark-to-Market on Bitcoin Taxation. *Journal of Legal Tax Research*, 15(1), 66–76.

Cataldi, B. D., & Downen, T. (2020). Value Judgements and the Effects of Accounting Disclosures. *Advances in Accounting Behavioral Research*, 23

Downen, T., Fuhner, Z., Cataldi, B., (2018). Overcoming Anchoring. *International Journal of Management Decision Making*, 18(3), 309–331.

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**PROFESSIONAL REFERENCES**

Dr. Ed O’Donnell

Emmerson/Groennert Professor of Accountancy Southern Illinois University

228A Rehn Hall

1025 Lincoln Drive

Carbondale, IL 62901

Office: 618-453-1497

Department: 618-453-2289

Fax: 618-453-1411

E-mail: [eod@business.siu.edu](mailto:eod@business.siu.edu)

Dr. Tom Downen

Associate Professor of Accounting UNC Wilmington

Cameron Hall 230M

601 South College Road Wilmington, NC 28403-5901 Office: 910-962-4104

Cell: 806-790-1173

Email: [downent@uncw.edu](mailto:downent@uncw.edu)

Dr. Bill Terando

Director Accounting, Management Information Systems Full Professor of Accounting

Butler University

Lacey School of Business LSB428

4600 Sunset Ave, Indianapolis, IN 46208

Office: 317-940-9372

Cell: 515-450-8398

Email: [bterando@butler.edu](mailto:bterando@butler.edu)