Patricia O'Sullivan, M.B.A.
Barton School Lecturer
School of Accountancy
W. Frank Barton School of Business
patricia.osullivan@wichita.edu

Academic Background

M.B.A. University of Kansas, Lawrence, KS, Accounting, 1975.

B.A. St. Louis University, St. Louis, MO, Psychology, 1970.

Memberships

KSCPA, 2012

Work Experience

Academic Experience

Adjunct, Wichita State University adjunct in accounting (2009 - 2011), Wichita, Kansas. Taught Accounting 210 and MBA 800 in evening

Assistant Professor, sterling college (1980 - 1982), sterling, Kansas. taught four accounting/finance/managment classes each semester

Adjunct Professor in Accounting, Hutchinson Community College (1976 - 1981), hutchinson, Kansas. taught Accounting 1 and 2 in evening

Non-Academic Experience

National

VIce President and Trust Officer, CornerBank N.A. (May, 2008 - August, 2011), Wichita, Kansas. Responsible for business development of trust and investment management relationships in Wichita and surrounding markets
Assist team in making personal and department goals
Identify estate planning techniques for client situations

Senior Vice President and Trust Team Leader, BAnk of America N.A. (1984 - 2007), Wichita, Kansas. Led a team of 8 in Private Wealth Management in building customers, adding assets, estate and retirement planning, foundations and taxes

Assistant Trust Officer, First National Bank of Hutchinson (1982 - 1984), hutchinson, Kansas. trust and estate and employee benefit administration

staff accountant, J.William Knightley CPA (1976 - 1978), hutchinson, Kansas. audit and tax and independent directors' examinations of Banks

Consulting

2015-2017: working with CPA firms on recruiting events and suggestions

2013-2017: Attorneys, Expert witness in trials regarding trust and financial legal and tax matters, I have served as an expert witness, paid, in trials regarding trust administration legal and tax matter and in other fiduciary matters. I have also consulted with other professionals regarding marketing fiduciary services especially CPA firms and law firms.

2014-2015: Work with widows referred by former bank clients and other professionals, Work with widows on a volunteer basis as to handling financial matters and tax after death of spouse; use my probate and former trust background to help advise and consult with him

2013-2015: CPA firms, Work with CPA firms on ways to market fiduciary services

2011-2014: Work with widows referred by former bank clients and other professionals, Work with widows on a volunteer basis as to handling financial matters and tax after death of spouse; use my probate and former trust background to help advise and consult with him

Paid Service

2012-2017: Law firms, Serving as expert witness for law firms on trustee issues and trustee fees

Courses Taught

Courses from the Teaching Schedule: Accounting for Decision Making and Control, Financial Accounting, Financial Statement Analysis, Managerial Accounting

Other Teaching Activities

Other Teaching Activities

2017 - Mentoring, recruiting and retention. Other Teaching Activities.

2016 - Beta Alpha Psi Advisor. Other Teaching Activities.

2016 - mentoring, recruiting and retention. Other Teaching Activities.

2016 - Mentoring, recruiting and retention. Other Teaching Activities.

Intellectual Contributions:

Presentation of Non-Refereed Papers

Local

O'Sullivan, P. (2016, November). Fiduciary Administration. Invited presentation at Wichita State University, wichita, Kansas.

O'Sullivan, P. (2015, November). Fiduciary Administration. Invited presentation at Wichita State University, wichita, Kansas.

O'Sullivan, P. (2014, November). Fiduciary Administration. Invited presentation at Wichita State University, wichita, Kansas.

Service:

Service to the University

Department Assignments

Faculty Advisor:

2011-2012: Faculty Advisor for Beta Alpha Psi

Member:

2017: Annual Accounting Conference

2014 – 2015: Annual Accounting Conference

2011 – 2014: Annual Accounting Conference

Department Assignments

Member:

2011-2012 – 2012-2013: School of Accountancy Curriculum Committee

Mentoring Activities:

2015-2016 – 2017-2018: liason to career services

2014-2015 – 2017-2018: Accounting students

Department Assignments

Other Institutional Service Activities:

2011-2012: DSI Scholarship Review

College Assignments

Faculty Advisor:

2011-2012 – 2017-2018: Beta Alpha Psi Faculty Advisor

Member:

2011-2012 – 2012-2013: Barton School of Business Business Week

University Assignments

Member:

2015-2016 – 2017-2018: Accounting Scholarship Committee

University Assignments

Member:

2010-2011 – 2017-2018: Wichita State University Gregg Marshall Benefit Auction

2009 – 2011: Wichita State University Rockin the Roundhouse Committe

University Assignments

Other Institutional Service Activities:

2017-2018: DSI Scholarship competition judge

Service to the Profession

Board of Directors: Substantial Involvement

2012 – 2016: Kansas State Board of Accountancy, wichita, Kansas. Appointed member of Board; appointed by Governor; meetings 7-8 times per year; also appointed to investigate CPAs on disciplinary matters

2009 – 2011: Wichita Estate Planning Council, Wichita, Kansas. Group of approximately 125 attorneys, CPAs, CLUs and CFPs and Trust Officers; have six meeting per year with continuing education provided with speakers; have served as program chair

Member: Committee/Task Force

2015 – 2016: EDUCATIONAL TASK FORCE, WICHITA, Kansas.   Member of committee to discuss changes and impact with the Society of CPAs possible changes on education requirements to sit for CPA exam in Kansas

2015: National Association of State Boards of Accountancy, WICHITA, Kansas.
Continuing Education Committee

Service to the Community

Member of a Committee

2017: envision non profit gala committee, member of fund raising gala committee

2016 – 2017: Larksfield Retirment Commuities Non Profit, voted by other board members to serve on nonprofit board

2016 – 2017: Larksfield Retirment Commuities Non Profit audit and financial committee

2016 – 2017: Rainbows United Charitable Trust Foundation, Serve as member of Board of the non profit

2015 – 2016: Homeowners Association

2015: Envision Inc, Worked on auction committee or fundraiser

2009 – 2014: Spay Neuter Kansas Inc, Serve as a board member of the organizatin and assist with fundraising events

Faculty Development

Assurance of Learning - Professional Development

2012: National Association of State Boards of Accountancy, Wichita, Kansas. appointed to CPE committee of NASBA to study CPE across nation for CPAs and work with AICPA, state boards and local societies on CPE

Other Professional Development

2015: Kansas State Board of Accountancy, Topeka, Kansas. Re-appointed to State Board of Accountancy by Governor Brownback for another 3 year term ending 7/31/16; total of 12 years on Board

2014: National Association of State Boards of Accountancy, Wichita, United States of America. Re-appointed to CPE committee of NASBA for another 1 year term

2012: State Board of Accountancy of Kansas, Topeka, Kansas. Appointed as member of State Board of Accountancy by Governor in 2005 and continue to serve; appointment expires in 2013

2011: Wichita Estate Planning Council, Wichita, Kansas. Attended monthly meetings of Council which focused on legal, tax and fiduciary and financial planning concepts; speakers were attorneys, CPAs, and other professional experts in their fields; for two years I was the program chairman and brought in speakers from other states to talk on legal and topics; qualified for CLE and CPE

2010: Wichita Estate Planning Council, Wichita, Kansas. Attended monthly meetings of Council which focused on legal, tax and fiduciary and financial planning concepts; speakers were attorneys, CPAs, and other professional experts in their fields; for two years I was the program chairman and brought in speakers from other states to talk on legal and topics; qualified for CLE and CPE

2009: Wichita Estate Planning Council, Wichita, Kansas. Attended monthly meetings of Council which focused on legal, tax and fiduciary and financial planning concepts; speakers were attorneys, CPAs, and other professional experts in their fields; for two years I was the program chairman and brought in speakers from other states to talk on legal and topics; qualified for CLE and CPE

2008: Wichita Estate Planning Council, Wichita, Kansas. Attended monthly meetings of Council which focused on legal, tax and fiduciary and financial planning concepts; speakers were attorneys, CPAs, and other professional experts in their fields; for two years I was the program chairman and brought in speakers from other states to talk on legal and topics; qualified for CLE and CPE

2008: In house brown bag training luncheons, Wichita, Kansas. Organized and conducted in house training for staff on legal, tax, and compliance and financial topics for department

2007: Wichita Estate Planning Council, Wichita, Kansas. Attended monthly meetings of Council which focused on legal, tax and fiduciary and financial planning concepts; speakers were attorneys, CPAs, and other professional experts in their fields; for two years I was the program chairman and brought in speakers from other states to talk on legal and topics; qualified for CLE and CPE

2007: In house brown bag training luncheons, Wichita, Kansas. Organized and conducted in house training for staff on legal, tax, and compliance and financial topics for department

Professional Seminars / Workshops

2015: Wichita State Unviersity's Annual Accounting/Auditing Conference, wichita, Kansas. Helped organize and attend sessions of the Conference

2010: Wichita State Unviersity's Annual Accounting/Auditing Conference, wichita, Kansas. Helped organize and attend sessions of the Conference

2010: Bank seminars, Wichita, Kansas. Attended banking seminars on financial planning and fiduciary tax through bank sponsored by law firm Foulston Siefkin LLP

2008: fBank of America training and professional development training seminars, Wichita, Kansas. Attended training seminars on legal, tax and regulatory issues in compliance in Kansas City, Chicago and Dallas while serving as Trust Team Leader for Bank of America;

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Honors-Awards-Grants

Honor

2015 – 2016: , Kansas State Board of Accountancy. Appointed to State Board of Accountancy by the Governor of Kansas; reappointed in 2008 and 2010 and 2013

2014: , National Association of State Boards of Accountancy. Appointed to CPE committee of NASBA.

2014: , Kansas State Board of Accountancy. Appointed to State Board of Accountancy by the Governor of Kansas; reappointed in 2008 and 2010 and 2013.

2013: , Kansas State Board of Accountancy. Appointed to State Board of Accountancy by the Governor of Kansas; reappointed in 2008 and 2010 and 2013.

2013: , National Association of State Boards of Accountancy. Appointed to CPE committee of NASBA.

2012: , National Association of State Boards of Accountancy. Appointed to CPE committee of NASBA.

2006 – 2012: , Kansas State Board of Accountancy. Appointed to State Board of Accountancy by the Governor of Kansas; reappointed in 2008 and 2010

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