

# Kelly Root, CPA

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## TEACHING EXPERIENCE

|  | <b>University of New Hampshire</b> | <b>Durham, NH</b> |
|--|------------------------------------|-------------------|
| August 2019-Present  | <i>Lecturer of Accounting</i>      |                   |
| <ul style="list-style-type: none"><li>• Manage and coordinate Introduction to Financial Accounting course</li><li>• Teach the following courses:<ul style="list-style-type: none"><li>○ Introduction to Financial Accounting (class size ranges from 35 to 120 students per class)</li><li>○ Intermediate Financial Accounting I (class size of approximately 20 students per class)</li></ul></li><li>• UNH Service:<ul style="list-style-type: none"><li>○ Faculty Advisor for Beta Alpha Psi (2020-present)</li><li>○ UNH LU AAUP Treasurer (2020-present)</li><li>○ MSA Social Media Committee member (2020-present)</li><li>○ Ad Hoc Committee on Student Services member (2021)</li><li>○ Recruit, hire and supervise TA's and proctors for ADMN 502 and 503</li><li>○ Faculty sponsor for student internship and independent studies</li><li>○ Prepare approximately 25 student recommendation letters per year</li></ul></li><li>• Earned Certificate in Effective College Instruction (April 2021) by the Association of College and University Educators and the American Council on Education</li></ul> |                                    |                   |

## PROFESSIONAL EXPERIENCE

|  | <b>Caron &amp; Bletzer, PLLC</b> | <b>Kingston, NH</b> |
|--|----------------------------------|---------------------|
| June 2019-December 2019  | <i>Principal</i>                 |                     |
| June 2013-June 2019  | <i>Senior Manager</i>            |                     |
| <ul style="list-style-type: none"><li>• Performed technical reviews of employee benefit plan audits performed by managers.</li><li>• Oversaw approximately 50 annual employee benefit plan audits of companies between 100 and 10,000 employees.</li><li>• Developed the company's recruiting process with the managing partner.</li><li>• Recruited students at local colleges and universities, including attending job fairs, on campus interviews, mock interviews, and accounting class and society meetings.</li><li>• Lead the firm's internal monitoring process. This includes coordinating reviews by outside organizations such as the Public Company Accounting Oversight Board, Department of Labor, and peer reviewers.</li><li>• Taught internal training classes to all levels of the firm, from interns to senior managers.</li><li>• Mentored staff and managers to support their professional growth.</li></ul> |                                  |                     |
| June 2009-June 2013  | <i>Manager</i>                   |                     |
| <ul style="list-style-type: none"><li>• Managed approximately 90 annual employee benefit plan audits of companies between 100 and 10,000 employees.</li><li>• Supervised and organized teams of 2 - 3 staff auditors to resolve problems and achieve reporting deadlines and client satisfaction.</li><li>• Executed all facets of the audit process including client communications, procedural planning, risk assessment, on-site audit testing, audit wrap up procedures, engagement review, audit committee meetings, and financial statement issuance.</li></ul>  |                                  |                     |

May 2006-June 2009

*Staff*

- Participated in various audit processes for approximately 50 employee benefit plan audits.
- Utilized ProFX Taxation software to complete tax forms 1040 for high net worth individuals, and forms 1065 and 1120 for local businesses.

## **EDUCATION**

**University of New Hampshire, Durham**

**Degree**

|                              |   |                     |
|------------------------------|---|---------------------|
| June 2006-<br>December 2007  | Whittemore School of Business and Economics<br>Master's Program in Accounting                       | Master of Science   |
| September 2002 -<br>May 2006 | Whittemore School of Business and Economics<br>Business Administration with an Option in Accounting | Bachelor of Science |

## **PROFESSIONAL AFFILIATIONS AND SERVICE**

- Member, American Institute of Certified Public Accountants
- Member, New Hampshire Society of CPAs
- Member, Finance Committee of the Windham, New Hampshire School Board

## **COMPUTER SKILLS**

Microsoft Office, ProFX Taxation, Adobe, QuickBooks, Tableau.