

Stephanie Peel

Professor of Practice and George E. Porter Accounting Faculty Fellow

School of Accounting • Lundquist College of Business • University of Oregon

Contact

1208 University St
Eugene, OR 97403
(541) 346-8010
speel@uoregon.edu



Overview

Stephanie is a Professor of Practice in the School of Accounting within the University of Oregon's Lundquist College of Business. A CPA retired from a 30 year career at PricewaterhouseCoopers, Stephanie has a broad base of experience in financial auditing, systems auditing, and data analytics, having served clients as both an external and internal auditor. She brings this experience into the classroom, through innovate coursework that endeavors to simulate many of the real-world experiences students will experience during their future careers in Accounting.

Stephanie has developed and currently instructs an upper-division / Masters level Accounting Data and Analytics course series. This year-long series enables students to develop skills and knowledge of this critical emerging skillset in the field of Accounting. The coursework focuses on how best to leverage accounting-related data in analyses that respond to business questions, presenting results in a way to educate, inform, influence decisions and create a call to action.

Stephanie has also had the unique experience of working with another industry-experienced instructor to co-develop a required Master of Accounting course related to Accounting Measurement and Disclosures. Updating the course to focus on the challenges experienced in the profession every day, the course explores the role of financial reporting in a capitalist market economy. It helps students to consider the motivations and implications of decisions made by individuals when they face uncertainty, the role of information asymmetry in capital markets, and the effect on financial reporting, using innovative case-based experiences.

In the first 25 years of her career, Stephanie specialized in providing financial statement audit, third party assurance and IT control services to a variety of clients, including those in the pharma / life sciences / med device, health provider, and higher education sectors.

Leveraging her experience in client service, she was a Risk & Quality leader for PwC's Health Industries Risk Assurance practice. She was also a Risk & Quality facilitator for technology innovations in PwC's Assurance practice.

Stephanie is passionate about learning, development, and mentorship, with a focus on diversity, equity and inclusion. Throughout her PwC career, she developed and delivered training on a variety of complex topics, grounded in course curriculum skills acquired through a two year Learning & Education Tour-of-Duty program. Those experiences with training in the corporate environment laid a foundation, supporting her transition into her current role in the Lundquist College at UO.

Education

Bachelor of Science –
Business Administration

Summa Cum Laude

Washington University
in St. Louis

Key Skills

External Auditing
Internal Auditing
Systems Auditing
Accounting Data Analytics
Internal Controls
Sarbanes-Oxley Act
Enterprise Risk Management
Microsoft Excel (Advanced)
Tableau Desktop (Advanced)

Representative Clients

Allergan Inc (prev. Watson
Pharmaceutical / Actavis)
Edwards Lifesciences
CareFusion Corporation
ResMed Inc.
Cedars-Sinai Medical Center
Sharp Healthcare
MemorialCare Hospital System
Vantage Oncology
CareMore
Insight Imaging
University of Southern California
Loyola Marymount University
California Institute of Technology
Pepperdine University
The RAND Institute
Bridgpoint Education
Obagi Medical Products
Valeant Pharmaceutical
Chevron Corporation
Kaiser Permanente
Bank of America

Relevant Roles & Experience

December 2018 - Current

Professor of Practice • George E. Porter Accounting Faculty Fellow •
University of Oregon

July 1990 – October 2019

PricewaterhouseCoopers LLP (prev. Price Waterhouse LLP)

- Managing Director (November 2004 – October 2019)
 - Health Industries Risk Assurance Risk & Quality Leader – National Office
 - Health Industries Risk Assurance Engagement Process Assurance Leader – Irvine, CA
 - Risk Assurance Process Assurance Controls Specialist – Portland, OR and San Francisco, CA
- Director (July 1998 – October 2004)
 - Data Assurance Regional Leader – San Francisco, CA
 - Data Assurance Site Leader – San Francisco, CA
- Manager (July 1995 – June 1998)
 - Data Assurance Specialist – Portland, OR
 - Learning and Development Tour of Duty – New York, NY
- Senior Associate / Associate (July 1990 – June 1995)
 - Core Assurance – Portland, OR
- Developed and delivered a three-course series in Accounting Data and Analytics, focused on the changing technological and business landscape that is giving rise to increased demand for use of data analytics across all facets of the accounting profession. The courses provide students with an understanding of data analytic thinking and terminology. Through in-class exercises, assignments, group case studies, and independent projects, students develop hands-on experience using scenarios and data relevant to the profession. The courses are designed to help students develop skills and experience with data analytics tools that are increasingly expected of those pursuing a career in accounting, as reflected in the AICPA's CPA Evolution as well as feedback from major employers of UO School of Accounting graduates.
- Redeveloped and delivered a Master of Accounting level course, focused on the role of financial reporting in a capitalist market economy. The course enables students to develop an ability to

analyze key stakeholders related to accounting and financial reporting decision making along with the motivations for and implications of each stakeholder's decision making. Students are then challenged to apply a framework to formulate recommendations and conclusions for accounting measurement and disclosure related issues, including through the context of an original case that evolves throughout the term, presenting thorny issues, asymmetric information, and an opportunity to negotiate head to head in arriving at acceptable financial reporting conclusions.

- Led client and PwC teams through control documentation, readiness assessments, formal attestation procedures, report development and issuance phases of attestation designed to provide comfort related to control activities designed to demonstrate compliance with the HIPAA Security Rule and related guidance from the National Institute of Standards and Technology (NIST) Special Publication 800-66. Reporting was performed under attestation standard AT101 as well as the Security criteria established in connection with the System and Organization Control (SOC) 2 reporting framework.
- Led numerous IT general controls audits for both external and internal audit clients to ensure that adequate controls over computerized information systems were in place for SOX 404 and other compliance purposes. Breadth of experience includes a wide array of common ERPs, including SAP, JD Edwards, Oracle and PeopleSoft as well as custom-developed applications, including mainframe, AS400, and Windows-based technologies and industry-specific technologies such as Epic and Cerner. The reviews included understanding client network architecture and then testing program change controls, general and application access/security controls, and computer operations as well as consideration of organization structure and policies.
- Led the global Sarbanes-Oxley Section 404 attestation for a Fortune 10 company. Major elements of the effort included directing the planning and scoping to determine appropriate testing efforts for more than 25 global locations, guiding development of testing plans, serving as the primary client contact for SOX-related issue resolution, interpreting PwC and regulatory guidance for application to the client attestation, serving as global subject matter expert to PwC attestation teams on application of testing plans and resolution of findings, and analyzing global attestation results to determine ultimate reporting disposition.
- Led the development of Sarbanes-Oxley Section 404 controls and identifying areas requiring remediation for a large national health

care company for three major control processes. Major components of the project included understanding the current state of controls, recommending controls improvements to enhance Section 404 compliance and improve overall efficiency, socializing control recommendations with multiple stakeholders, and developing plans to enable the organization to change behaviors in order to demonstrate greater control compliance.

- Directed engagements for Fortune 500 clients related to various phases of data transformation or migration projects, from process review to testing, and reconciliation of completed migrations.
- Directed and managed a multi-disciplinary team of PwC and client professionals in the development of post-merger and post-restructuring reporting environments for significant standalone entity reporting requirements. Major elements of the reporting process were developed using Hyperion Enterprise, Retrieve, MS Excel and MS Access.
- Directed several ERP and Consolidation application pre- and postimplementation reviews to assist clients with Sarbanes-Oxley readiness, as well as to identify implementation issues in areas such as security and application controls.
- Directed a large data management project team in support of a high-profile multibillion-dollar litigation project for one of the nation's top five banking institutions. The project encompassed data mining to retrieve key data maintained on several client information systems utilized over the course of 25 years. Led the team in designing and developing complex relational databases to support preparation of documentation for use in expert testimony and using forensic analysis to reconstruct contemporaneous accounting records and develop of an estimated damage calculation for trial and mediation.
- Performed many reviews of controls and procedures surrounding computerized applications, including testing of sales, accounts receivable, payroll, general ledger, physical inventory, purchases, and accounts payable applications.
- Planned, performed and supervised numerous financial audits for various public, private, and government entities.
- Designed, developed and taught continuing education materials for PricewaterhouseCoopers financial and systems auditors nationwide, from staff through partner level. Training courses included focus on planning and executing an information systems control reliant audit as well as emerging risk and quality topics.

Communication

Enhancing the "Peer" in Peer Financial Education

Association for Financial Counseling & Planning Education • 2021 Experience AFCPE Conference • November 16, 2021

Understanding Credit

UO Financial Wellness Center • UO Women in Flight Financial Wellness Month Event • April 2021 (repeat: 03/01/2022)

Understanding Interest: Saving, Borrowing and the Good/Bad/Ugly of Interest

UO Financial Wellness Center • 2021 Peer Financial Coach Training • September 16, 2021

Be Bold and Present with Power

UO Master of Accounting • 2020 Orientation • September 22, 2020
* Now incorporated into annual MAcc Orientation Week (delivered in 2021 and 222)

Storytelling: The Art of the Business Presentation

UO Master of Accounting / Master of Science-Finance • Spring Professional Development Seminar • April 14, 2019

Leadership

October 2019 - Current

Lundquist Faculty Liaison • Financial Wellness Center • University of Oregon

August 2020 - Current

Committee Member • Lundquist College of Business Diversity Committee • University of Oregon

September 2021 - Current

Faculty Advisor • Lundquist College of Business Out Leaders in Business Student Club • University of Oregon

September 2022 - Current

Committee Member • Lundquist College of Business • School of Accounting CPA Advising Committee • University of Oregon

September 2022 - Current

Committee Member • Lundquist College of Business • School of Accounting Curriculum Committee • University of Oregon

Certifications & Memberships

- Certified Public Accountant (CPA) – licensed in Oregon (active) and California (inactive)
- Tableau – Certified Data Analyst (Early Bird designation), Author, and Desktop Specialist Certifications
- PwC – Digital Acumen Badge
- American Institute of Certified Public Accountants, member
- American Accounting Association, member