

Kelly Drakey

CPA / Lecturer / Accounting Professional



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Houston, TX



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EXPERTISE

Team Leadership

Project Planning

Technical Accounting
Evaluation

Auditing Issues Resolution

Audit Methodology

Controls Assessment

Process Efficiency

Data Analytics

Risk Assessment

Professional Training

EDUCATION

MASTER'S DEGREE

Accounting
Tulane University
2003 - 2004

BACHELOR OF SCIENCE

Accounting
Tulane University
1999 - 2003

CAREER SUMMARY

CPA, Lecturer, and Accounting Professional with 13 consecutive #1 performance ratings at PwC, one of the world's leading audit and professional services firms. Key contributions include:

- Planning and executing audits in the healthcare, services, retail and manufacturing industries for clients including large multi-nationals, publically traded companies, private equity portfolio companies and family owned businesses.
- Selected to participate on an elite, national team to re-write and implement audit methodology and policy for non-public company audits.
- Facilitated multiple internal trainings for regional/national audiences at PwC and have curated multiple courses for Rice's Jones School of Business, focusing on bringing practical real world examples and cases to the Accounting and Auditing students.

EXPERIENCE

LECTURER - ACCOUNTING

Rice University, Houston, TX | 2018 - Present

- Refined the **Intro to Auditing** course to ensure CPA exam preparedness while training students have an excellent base for decision making, auditing key areas of judgment, and determining appropriate testing methods to maximize efficiency and effectiveness.
- Designed and facilitated a graduate level course, **Advanced Auditing**, which provided students with an in-depth understanding of professional auditing standards, an opportunity to practice investigation of accounting and audit issues and communicate results through professional technical writing. Students were able to build and demonstrate critical thinking skills, professional skepticism, and develop a better awareness of Management bias through several exercises and cases.
- Engineered a complete overhaul of the **Accounting Control Systems** course to assist students in developing a full understanding of internal controls over financial reporting, the COSO framework, and the impact of risks of fraud and error on internal controls.
- Participates in the steering committee for the MACC program to help add value to the program and provide insights from a recent practitioner's standpoint.

SENIOR MANAGER, ASSURANCE

PwC, Houston, TX | 2004 - 2018

- Led engagement teams for a portfolio of 6-10 clients per year which contributed \$2 million to \$3 million in revenue annually.
- Consulted with National Office to resolve multiple challenging technical issues on behalf of my clients including FCPA violations, tax issues (VAT, NOL's, VA's, UTP's), Principal Audit Considerations, Predecessor/Successor, Going Concern, Discontinued Operations, Goodwill impairments, Legal contingencies, etc.
- Primary PwC contact for client Management including CFO's, CAO's, Controllers, and Accounting Managers to help them navigate complex transactions including significant acquisitions, dispositions, initial public offering, among others.
- Anticipated and resolved issues timely and with confidence (e.g. liquidity and going concern, evaluating misstatements, risk management consultations, etc.).
- Mentored dozens of individual staff members over my career both formally and informally which has contributed to their career growth and promotion.

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TECHNICAL SKILLS

CPA Certified in Texas

Microsoft Office Suite

Google Suite

QuickBooks

IDEA

Tableau

Zoom

Panopto

Social Media

EXTRA

RECOGNITION

#1 Performance Rating
PwC

From FY 2005-06
through FY 2017-18

RECOGNITION

Nominated to the Staff
Advisory Council to the
National Senior Assurance
Partner of PwC (Manager
Council – Houston Delegate)
2010-2011

EXECUTIVE EDUCATION

Northwestern University,
Kellogg School of
Management
PwC Family Enterprise
Advanced Education
Program Attendee
June 2017

VOLUNTEER EXPERIENCE

St. Anne School Foundation
Houston, TX
Trustee and Treasurer
2019 – Present

EXPERIENCE continued

Other Distinguished Roles Held at PwC

HOUSTON MARKET TEAM TRANSFORMATION LEADER (MTTL) | 2016 – 2017

ENGAGEMENT PERFORMANCE QUALITY (EPQ) CHAMPION | 2014 – 2016

PwC, Houston, TX | 2014 – 2017

- Led the initiatives for the Houston Private Client Services (PCS) market as the EPQ Champion and MTTL which were roles focused on bringing efficiency and effectiveness to engagement teams in order to improve quality and profitability. (EPQ is PwC's version of a 6-sigma style set of techniques and tools for process improvement specific to financial statement audits)
- Performed over 25 workshops with engagement teams, that supported them in adopting the Non-Public methodology, identified ways to capitalize on new firm technology, and implement the EPQ/project management concepts.
- Organized debrief discussions among the seniors and associates in the practice to brainstorm and share learnings and best practices.
- Assisted in the development of PCS specific project management tools which were used by audit teams throughout the US.
- Served as the PCS representative to the MTTL Steering Committee (comprised of 7 MTTL's out of the ~100 from all US markets) which was responsible for the collection and sharing of better practices to the broader MTTL group, and for providing feedback and direction to the US Assurance Leadership Team.

SENIOR MANAGER, NATIONAL QUALITY ORGANIZATION (NQO) TOUR

PwC, Florham Park, NJ | 2014 – 2016

- Selected to participate in the creation of the PwC Non-Public Audit Guide, becoming a subject matter expert within several facets of the AICPA standards and related PwC policy and guidance.
- Authored multiple PwC policy/position papers, including those on Documentation Standards, Substantive Analytics Thresholds, and Significant Risks.
- Developed the Audit Policy Update on substantive analytics thresholds and re-wrote the guidance/policy on several other sections of PwC Non-Public Audit Guide including: Documentation, Review/ Supervision, Substantive Analytics, Required Planning sign-offs, among others.
- Coached a team of other Senior Managers and Managers and reviewed their work on several other PwC Non-Public Audit Guide sections including Testing Reconciliations, Confirmations, Concluding on Significant Matters, etc.
- Led discussions with national partners, including the National Chief Auditor, while advocating for smart policy positions that were right sized for our non-public client service teams.
- Brought a confident and independent point of view to policy discussions which required me to liaise across multiple faculties including Risk Management, Accounting Services Group, and the Office of General Counsel.
- Assisted the Global Network Assurance Methodology Group (NAMG) with the writing/publishing of the Global Revenue Guide (a white paper including examples to the practice for implementation and application).