

Kasey S. Tarantino

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Education

- Texas Tech University – College of Human Sciences, Lubbock, Texas** August 2014
- Master of Science in Personal Financial Planning
- Cornell University – Nolan School of Hotel Administration, Ithaca, New York** May 2010
- Bachelor of Science Degree – Hospitality Business Administration
- The Art Institute of Dallas – Culinary Arts, Dallas, Texas** June 2002
- Associate of Applied Science

Continuing Education

Cornell University – eCornell Certificates

- Restaurant Revenue Management June 2024
- Business Analytics September 2023
- Spreadsheet Modeling June 2022
- Data Analytics September 2021

Current Positions

Cornell University – SC Johnson College of Business

July 2019 - Present

Lecturer of Information Systems and Analytics

Ithaca, NY

Nolan School of Hotel Administration – Operations, Technology, and Information Management

- HADM 1740/2740 – Business Computing
- HADM 4770/6770 – Advanced Business Modeling

Instructor for Excel-Specific Workshops

- Nolan Hotel School MMH Excel Workshop – Summer 2020
- Johnson MSP Excel Class – Fall 2019

Teaching Award

- 2024 – Ted Teng '79 Dean's Teaching Excellence Award
- 2023 – Cornell Nolan School of Hotel Administration Graduate Elective
- 2021 – Cornell Nolan School of Hotel Administration Undergraduate Elective

Committee and Service Assignments

- Faculty Advisor for Cornell Hotel Society, Collegiate Chapter (CHS, CC)
- Title IX Policy 6.4 Hearing/Appeal Panelist and Co-Investigator
- Nolan School of Hotel Administration Admissions Committee
- Faculty Advisor for 20 Nolan Students
- Faculty Chair for Phil Miller Legacy Award

Tarantino Culinaire

July 2003 – Present

Restaurant Consultant

Various Locations throughout the USA

- Teach clients how to look at their business from an outsider's point of view – a consultant's view.
- Help clients document and prioritize all their responsibilities, then explain how to methodically organize the list in a way that provides them the ability to make strategic decisions, instead of making last-minute, reactive ones.

eCornell

April 2018 – June 2024

Online Facilitator (Business Analytics, Spreadsheet Modeling, Hotel Revenue Management, Business Economics,

Online

Leading a Culture of Service Excellence Certificates, and the Enhancing Data Visualizations with Tableau class, Assessing Nonprofits Using Financial Statements and Ratios) Average student evaluation score of 4.6 out of 5.0

- Responsible for online facilitation of 2 classes per month
- Hold online Q&A Sessions once per week
- Facilitate and encourage collaboration via discussion boards within 24 hours of students' posts
- Provide constructive feedback on all projects and assignments within 48 hours of submission

Financial Planning Work History

The Strebel Planning Group

August 2014 – October 2017

Financial Planner/Consultant

Ithaca, NY

- Responsible for organizing the information needed to update financial plans via various documents/sources
- Input data into the appropriate financial planning software with extremely high attention to detail
- Review, analyze, and create various planning scenarios prior to annual financial plan reviews
- Conduct briefs and debriefs with Advisors regarding client reviews
- Participate in both client review meetings and prospect/new client meeting process
- Package and deliver annual financial plans to clients
- Create a procedural checklist for properly updating clients' financial plans ensuring no details were overlooked
- Train and review work performed by Para Planners prior to submission
- Responsible for researching and making recommendations on new technology/software to be implemented
- Continuously update and customize financial plan review checklists for various financial planning software systems
- Known as the "go-to" person for Social Security questions, and Social Security Analysis for clients after attending a multi-day, in-depth Social Security training workshop
- Co-presented a Social Security Seminar to current clients and their guests
- Create various client presentations (via PowerPoint) for the Financial Planning department of the firm
- Researched, created, and presented a complete business plan (containing 233 slides) for the implementation of a subscription-based financial planning service for Generation X / Millennial markets

Pennington, Bass & Associates

2013 Summer Internship

Financial Planning Firm

Lubbock, TX

Intern

- RedTail CRM Company Data Transition

Texas Tech University, Department of Financial Planning

January 2013 – May 2013

Graduate Assistant

Lubbock, TX

Texas Tech University, Department of Financial Planning

August 2013 – August 2014

Associate Instructor (Introduction to Applied Personal Finance; Financial Goal Strategies)

Lubbock, TX

- Face-to-Face and Online Instruction of Graduate and Undergraduate Level Courses

Accounting, Administrative, and Human Resources Work History

Ernst & Young, LLP

Mar. 2011 – Dec. 2011

Shared Services Center, HR Compliance – Visa, Immigration & I9 Support Team

Dallas, TX

Operations Administrator

- Assisted Immigration Liaison with the Permanent Electronic Review Management (PERM) job market testing
 - Facilitated communication between and interacted with *Egan, LLC* (Immigration Business Law Firm), Recruiters, and People Consultants to ensure accuracy of initiation and recruiting with respect to the PERM process for numerous Foreign Nationals
 - Reviewed resumes submitted through Taleo and qualified/disqualified them against recruitment requirements, conducted candidate phone screens when necessary, and managed the PERM central tracker.
- Initiated various Visas and Labor Condition Applications (LCAs) for Foreign Nationals working for Ernst & Young
- Continuously updated Employee's Visa information
 - Reviewed Visa approvals, cross-referenced information with *Egan's* Immigration Tracker, and updated information in PeopleSoft

The Uptime Institute (Computer Engineering)

Mar. 2006 – Apr. 2007

Bookkeeper

Santa Fe, NM

- Processed payroll for a 32-person organization
- Prepared the 2007 budget for the shared administration category of the parent company

National Credit Union Administration (Supervising Agency for Federal Credit Unions)

Jan. 2004 – Oct. 2004

Accounting Clerk

Austin, TX

- Reconstructed bank reconciliations & other schedules for troubled credit unions.
- Filed missing state & federal tax returns and audited existing filed forms.

Accounting, Administrative, and Human Resources Work History (cont.)

The Mozzarella Company (Artisan Cheese Factory) Sept. 2002 – Oct. 2003
Administrative Assistant Dallas, TX

- Handled accounts receivable for wholesale/retail food companies
- Developed and helped coordinate special event programs

Hospitality Work History

SuperMedia Hotel & Conference Center (ARAMARK) July 2010-December 2010
Food & Beverage Director Dallas, TX

- Responsible for two food and beverage locations totaling \$1.3 million in revenue
- Created new menu ideas for the 4-week cycle menu and all VIP catering menus

Risley Dining – Cornell University (Campus Dining Hall) February 2010 – April 2010
Food Service Worker/Grill Station Trainer Ithaca, NY

Cornell's Adult University (On-Campus Summer Program) 2009 Summer Internship
Head Hospitality Coordinator Ithaca, NY

- Ordered, purchased, and received all food and beverage items
- Prepared all break-food items for approximately 350 guests
- Coordinated on-campus meals and special events with Cornell Dining and Catering

Joe's Restaurant (220 Seat Casual Dining Italian Restaurant) May 2008 – June 2009
Assistant Manager Ithaca, NY

- Implemented and carried out a menu costing program successfully
- Lowered bar cost by 20% through analysis and changes
- Conducted weekly bar inventory and orders

The Statler Hotel and Various Restaurants 2001 - May 2008
Valet and Food Server NC, NY & TX

Tarantino Culinaire, Inc. (Café, Catering Company, and Cooking Classes) Oct. 2004 - Dec. 2005
Owner Lubbock, TX

- Created/developed business plans for food manufacturing, catering, and culinary education
- Hired, trained, and supervised a staff of two full-time and three part-time employees
- Co-conducted catering events ranging from three people to two hundred

Academic Accomplishments

FSP Industry Interest Competition Honorable Mention • Steamboat Scholar Finalist • Cornell University SHA Models of Excellence Class Representative • Hotel Marketing Plan – La Tourelle Resort & Spa - Group Project Class Winner

Professional Associations and Volunteer Work

Financial Planning Association (FPA) • VITA – Volunteer Income Tax Assistance e-filer

Technical Skills

Destiny • Canvas • Blackboard • ScreenFlow • Vimeo • Salesforce XLR8 CRM • SmartOffice CRM • RedTail CRM • MS Office Suite - Advanced Excel Skills • Laserfiche Certified • Income Discovery – Retirement Income Planning Software • Morningstar.com • Morningstar Office • MoneyGuidePro • eMoney • Money Tree • NaviPlan • Overlap.com • Schwab Portfolio Center • Everplans • Horseshmouth Savvy Social Security Calculator Software • QuickBooks Pro • PeopleSoft • Profiles Professional • Lotus Notes • Oracle Taleo