

JONATHAN MICHAEL REUTER
CARROLL SCHOOL OF MANAGEMENT
SEIDNER DEPARTMENT OF FINANCE
BOSTON COLLEGE

Fulton Hall, Room 360E
Chestnut Hill, MA 02467

Phone: 617-552-2863
Email: reuterj@bc.edu

CURRENT POSITIONS

Boston College, Carroll School of Management
Associate Professor of Finance (with tenure), September 2014–present

National Bureau of Economic Research
Research Associate, Aging Program, September 2014–present

TIAA Institute Fellow, June 2014–present

Scholars Advisory Group, Retirement Income Institute, May 2021–present

PREVIOUS POSITIONS

MIT Sloan School of Management, Finance Group
Visiting Scholar, September 2021–December 2021

Harvard University, Department of Economics
Visiting Scholar, September 2015–December 2015

Boston College, Carroll School of Management
Assistant Professor of Finance, July 2008–August 2014

Lundquist College of Business, University of Oregon
Assistant Professor of Finance, July 2003–June 2008
Laura and Abbott Keller Distinguished Research Scholar, July 2006–June 2008

National Bureau of Economic Research
Faculty Research Fellow, Aging Program, April 2010–August 2014

MIT Entrepreneurship Center, Sloan School of Management
Post-Doctoral Research Fellow, July 2002–June 2003

Law and Economics Consulting Group, Washington, DC
Associate, January 1997–August 1997
Research Analyst, June 1995–December 1996

EDUCATION

Massachusetts Institute of Technology
Ph.D., Department of Economics, 2002
National Science Foundation Graduate Research Fellowship, 1997–2001

Johns Hopkins University
 Bachelor of Arts, Department of Economics, 1995
 Minors in Mathematical Sciences and Philosophy, 1995
General and Department Honors
Max Hochschild Fund Award in Economics
Federal Reserve Bank of Richmond Excellence Award
Phi Beta Kappa

PEER REVIEWED PUBLICATIONS

1. Reuter, Jonathan, and Eric Zitzewitz, 2006, “Do Ads Influence Editors? Advertising and Bias in the Financial Media,” *Quarterly Journal of Economics* 121(1): 197–227.

DOI: <https://doi.org/10.1093/qje/121.1.197>

Conferences: Financial Media and Investment Decisions: A Comparison of United States and Italian Financial Markets (2006), Wharton Conference on Household Portfolio Choice and Financial Decision Making (2005), American Finance Association Meetings (2005), NBER Industrial Organization Summer Institute (2004), International Industrial Organization Conference (2004)

2. Reuter, Jonathan, 2006, “Are IPO Allocations for Sale? Evidence from Mutual Funds.” *Journal of Finance* 61(5): 2289–2324.

DOI: <https://doi.org/10.1111/j.1540-6261.2006.01058.x>

Conferences: The Ohio State University/Federal Reserve Bank of New York/*Journal of Financial Economics* Conference on Agency Problems and Conflicts of Interest in Financial Intermediaries (2004), Tuck Conference on Contemporary Corporate Finance Issues III (2004), Western Finance Association Meetings (2004), Pacific Northwest Finance Conference (2003), EVI Conference on Entrepreneurship, Venture Capital, and Initial Public Offerings (2003)

3. Reuter, Jonathan, 2009, “Does Advertising Bias Product Reviews? Testing for Biased Wine Ratings,” *Journal of Wine Economics* 4(2): 125–151. **Lead article.**

DOI: <https://doi.org/10.1017/S1931436100000766>

4. Massa, Massimo, Jonathan Reuter, and Eric Zitzewitz, 2010, “When Should Firms Share Credit with Employees? Evidence from Anonymously Managed Mutual Funds,” *Journal of Financial Economics* 95(3): 400–424.

DOI: <https://doi.org/10.1016/j.jfineco.2009.10.006>

Grant: Q-Group Research Grant (2005)

Conferences: NBER Industrial Organization Winter Program Meeting (2007), American Finance Association Meetings (2007), European Finance Association Meetings (2006), Utah Winter Business Economics Conference (2006)

5. Chalmers, John, and Jonathan Reuter, 2012, “How Do Retirees Value Life Annuities? Evidence from Public Employees,” *Review of Financial Studies* 25(8): 2601–2634.

Winner of 2013 TIAA-CREF Paul A. Samuelson Award

DOI: <https://doi.org/10.1093/rfs/hhs057>

Working paper: NBER #15608

Grant: Social Security Administration Grant, NBER Retirement Research Center (2008-2009)

Conferences: American Finance Association Meetings (2011), Boston Area Consumer Finance Research Workshop (2010), Netspar Pension Workshop (2010)

6. Morrin, Maureen, Jeffrey Inman, Susan Broniarczyk, Gergana Nenkov, and Jonathan Reuter, 2012, “Investing for Retirement: The Moderating Effect of Fund Assortment Size on the 1/N Heuristic,” *Journal of Marketing Research* 49(4): 537–550.

DOI: <https://doi.org/10.1509/jmr.08.0355>

7. Del Guercio, Diane, and Jonathan Reuter, 2014, “Mutual Fund Performance and the Incentive to Generate Alpha,” *Journal of Finance* 69(4): 1673–1704.

Finalist for 2016 TIAA Paul A. Samuelson Award

DOI: <https://doi.org/10.1111/jofi.12048>

Working paper: NBER #17491

Conferences: SIFR Workshop on Mutual Funds (2012), HKUST Symposium on Household Finance (2012), Boston College Center for Asset Management Conference on Financial Markets (2011)

8. Chalmers, John, Woodrow Johnson, and Jonathan Reuter, 2014, “The Effect of Pension Design on Employer Costs and Employee Retirement Choices: Evidence from Oregon,” *Journal of Public Economics* 116 (August): 17–34. *Special Issue: NBER Pensions.*

DOI: <https://doi.org/10.1016/j.jpubeco.2013.07.001>

Working paper: NBER #18517

Grant: Social Security Administration Grant, NBER Retirement Research Center (2007-2008)

Conferences: NBER State and Local Pensions Conference (2012), 10th Annual Retirement Research Consortium Conference (2008), Conference on Understanding Economic Decision-Making (2008)

9. Balduzzi, Pierluigi, and Jonathan Reuter, 2019, “Heterogeneity in Target Date Funds: Strategic Risk-taking or Risk Matching?” *Review of Financial Studies* 32(1): 300–337.

Finalist for 2019 TIAA Paul A. Samuelson Award

DOI: <https://doi.org/10.1093/rfs/hhy054>

Working paper: NBER #17886

Previous titles: Heterogeneity in Target-Date Funds and the Pension Protection Act of 2006, Heterogeneity in Target Date Funds: Optimal Risk-Taking or Risk Matching?

Grant: Social Security Administration Grant, NBER Retirement Research Center (2010-2011)

Conferences: Rodney L. White Center for Financial Research Conference on Financial Decisions and Asset Markets (2015), European Finance Association Meetings (2012), 13th Annual Retirement Research Consortium Conference (2011)

10. Kisgen, Darren, Jordan Nickerson, Matthew Osborn, and Jonathan Reuter, 2020, “Analyst Promotions within Credit Rating Agencies: Accuracy or Bias?” *Journal of Financial and Quantitative Analysis* 55(3): 869–896.

DOI: <https://doi.org/10.1017/S0022109019000243>

Working paper: NBER #22477

Conferences: University of Tennessee Smokey Mountain Finance Conference (2017), Northeastern University Finance Conference (2016), University of Connecticut Risk Management Conference (2016), Colorado Finance Summit (2015), The Economics of Credit Rating Agencies, Credit Ratings and Information Intermediaries (2015)

11. Chalmers, John, and Jonathan Reuter, 2020, “Is Conflicted Investment Advice Better than No Advice?” *Journal of Financial Economics* 138(2): 366–387.

DOI: <https://doi.org/10.1016/j.jfineco.2020.05.005>

Working paper: NBER #18158

Previous title: What is the Impact of Financial Advisors on Retirement Portfolio Choices and Outcomes?

Grant: Social Security Administration Grant, NBER Retirement Research Center (2009-2010)

Conferences: WU Gutmann Center Symposium on Financial Advice and Asset Management (2017); SIFR Workshop on Insurance (2014), American Finance Association Meetings (2014), NBER Behavioral Finance Program Meeting (2013), European Retail Investment Conference (2013), Financial Intermediation Research Society Conference (2012), SFS Finance Cavalcade (2011), Netspar Pension Workshop (2011)

12. Reuter, Jonathan, and Eric Zitzewitz, 2021, “How Much Does Size Erode Mutual Fund Performance? A Regression Discontinuity Approach,” *Review of Finance* 25(5): 1395–1432.

**Winner of 2022 Spängler/IQAM award for
Best Investments Paper in *Review of Finance***

DOI: <https://doi.org/10.1093/rof/rfab016>

Working paper: NBER #16329

Conference: Financial Intermediation Research Society Conference (2012)

OTHER PUBLICATIONS

13. Chalmers, John, Olivia S. Mitchell, Jonathan Reuter, and Mingli Zhong, 2022, “Do State-Sponsored Retirement Plans Boost Retirement Saving?” *AEA Papers and Proceedings* 2022 112: 142–146.

DOI: <https://doi.org/10.1257/pandp.20221021>

Related working paper: Summarizes survey results in NBER #28469 (“Auto-Enrollment Retirement Plans for the People: Choices and Outcomes in OregonSaves,” February 2021)

Conference: AEA Session on “Behavioral Economics and Pension Design” (2022)

14. Reuter, Jonathan, and Antoinette Schoar, 2024, “Demand-Side and Supply-Side Constraints in the Market for Financial Advice.” *Annual Review of Financial Economics* 16: 391–411.

DOI: <https://doi.org/10.1146/annurev-financial-110921-012809>

Working paper: NBER #32452

15. Reuter, Jonathan, **June 2024**, “Plan Design and Participant Behavior in Defined Contribution Retirement Plans: Past, Present, and Future” [*written for The Wharton School Pension Research Council volume “Household Retirement Saving, Investment, and Spending: New Lessons from Behavioral Research”*]

DOI: coming soon

Working paper: NBER #32653

Conference: Pension Research Council 2024 Spring Symposium

ACTIVE WORKING PAPERS

1. Chalmers, John, Olivia S. Mitchell, Jonathan Reuter, and Mingli Zhong, **October 2024**, “Will State-Based Retirement Savings Plans Boost Retirement Saving? New Evidence from OregonSaves,” *Journal of Public Economics* (Conditional Acceptance).

Grants: U.S. Social Security Administration (SSA) via Michigan Retirement Research Center (MRRC); Pew Foundation; AARP; Trio Quartet funded by Pension Research Council/Boettner Center; Trio Quartet funded by Pension Research Council/Boettner Center and the Center on Health Initiatives and Behavioral Economics
Earlier working papers: “Auto-Enrollment Retirement Plans for the People: Choices and Outcomes in OregonSaves,” February 2021, NBER #28469; “Evidence on Auto-Enrollment Retirement Plan Efficacy from OregonSaves,” September 2022, Working Paper available on jonreuter.com
Conferences: 7th International Pension Research Association Conference (2022), Retirement and Disability Research Consortium Annual Meeting (2019), NBER Conference on Incentives and Limitations of Employment Policies on Retirement Transitions (2019)
2. Chak, Ida, Karen Croxson, Francesco D’Acunto, Jonathan Reuter, Alberto Rossi, and Jonathan Shaw, **March 2024**, “Robo-Advice for Household Debt Repayment.”

RCT ID: AEARCTR-0006447
Earlier working papers: “Robo-Advice for Borrower Repayment Decisions,” August 2022, FCA Occasional Paper No 61; “Improving Household Debt Management with Robo-Advice,” November 2022, NBER #30616
Conferences: EFA (2024), 18th International Finance UC Conference (2024), LSE-IFS-UCL-CEPR-Imperial Business School workshop on Household Finance (2023), CFPB Research Conference (2022)
4. Del Guercio, Diane, Egemen Genç, Jonathan Reuter, and Hai Tran, **September 2024**, “Have Passive Managers Benefited from the Dramatic Rise of Passive Investing?” Working Paper.
4. Patel, Nimesh, Harold “Tray” Spilker, and Jonathan Reuter, **October 2024**, “Alpha by Affiliation,” Working Paper, **Under Review**.
5. Blanchett, David, Michael Finke, and Jonathan Reuter, **June 2020**, “Portfolio Delegation and 401(k) Plan Participant Responses to COVID-19,” *NBER #27438*.

Winner of 2020 ICPM Research Award

6. Reuter, Jonathan, and David Richardson, **July 2022**, “New Evidence on the Demand for Advice within Retirement Plans,” *NBER #30261*.

Grant: TIAA Institute (2014-2016)
Working papers: TIAA Institute Research Dialog #139, NBER #30261
Conference: Cherry Blossom Financial Education Institute (2017), TIAA Institute Fellows Symposium (2016)

OLD WORKING PAPERS

1. Reuter, Jonathan, **November 2015**, “Revisiting the Performance of Broker-Sold Mutual Funds,” Working Paper.
2. Finke, Michael, and Jonathan Reuter, **November 2017**, “Are the Elderly More Likely to Receive Conflicted Financial Advice? Evidence from Client Surveys,” Working Paper.

Grant: Pension Research Council/TIAA Partnership (2016-2017)

Conferences: TIAA Institute/PRC Research Symposium (2018), TIAA Institute/PRC Research Symposium (2017)

3. McKnight, Robin, Jonathan Reuter, and Eric Zitzewitz, **February 2012**, “Insurance as Delegated Purchasing: Theory and Evidence from Health Care,” *NBER #17857*.
4. Del Guercio, Diane, Jonathan Reuter, and Paula Tkac, **July 2010**, “Broker Incentives and Mutual Fund Market Segmentation,” *NBER #16312*.

Conferences: NBER Summer Institute Household Finance Workshop (2010), Rotterdam School of Management Professional Asset Management Conference (2010), Pacific Northwest Finance Conference (2008), University of Texas at Austin Institutional Investors Conference (2007)

RESEARCH AWARDS AND GRANTS (EXCLUDING THOSE RECEIVED BY CO-AUTHORS)

2022	Winner of Spängler/IQAM award for Best Investments Paper published in <i>Review of Finance</i> (between issue 4 of 2021 and issue 3 of 2022)
2020	Winner of 2020 ICPM Research Award
2019	Finalist for 2019 TIAA Paul A. Samuelson Award for Outstanding Scholarly Writing on Lifelong Financial Security
2016	Finalist for 2016 TIAA Paul A. Samuelson Award for Outstanding Scholarly Writing on Lifelong Financial Security
2013	Winner of 2013 TIAA-CREF Paul A. Samuelson Award for Outstanding Scholarly Writing on Lifelong Financial Security
2016–2017	Research grant from 2016-2019 Pension Research Council/TIAA Partnership
2014–2016	Research grant from TIAA Institute (for use of anonymous account-level data)
2010–2011	Research support from Social Security Administration Grant #10-M-98363-1-03, administered through NBER Retirement Research Center
2009–2010	Research support from Social Security Administration Grant #10-M-98363-1-02, administered through NBER Retirement Research Center
2008–2009	Research support from Social Security Administration Grant #10-M-98363-1-01, administered through NBER Retirement Research Center
2007–2008	Research support from Social Security Administration Grant #10-P-98363-1-05, administered through NBER Retirement Research Center
2005	Research grant from Institute for Quantitative Research in Finance (“Q Group”)
2010	Carroll School of Management Research Catalyst Award
2008	Carroll School of Management Kelley Research Award
2002	MIT Schultz Fund Research Grant

PROFESSIONAL ACTIVITIES

Conference Presentations (*excludes presentations by co-authors*)

2024	18th International Conference of Finance UC (<i>Santiago, Chile</i>)
2024	Pension Research Council Symposium (<i>Philadelphia, PA</i>)
2024	FinRegLab Advisory Board Meeting (<i>via Zoom</i>)
2022	7th International Pension Research Association Conference (<i>OECD, Paris</i>)
2022	AEA Session on Behavioral Economics and Pension Design (<i>via Zoom</i>)
2020	McCombs School of Business and University of Texas Law Policy and Compliance Series Conference on Regulation Best Interest (<i>Austin, TX</i>)

2019	Financial Conduct Authority-Imperial College London Conference on Household Finance and Consumer Decision-making (<i>London, UK</i>)
2018	TIAA Institute/PRC Research Symposium on Behavioral Finance and Saving: Determinants of Retirement Readiness (<i>Washington, DC</i>)
2017	TIAA Institute/PRC Research Symposium on Behavioral Finance and Saving: Determinants of Retirement Readiness (<i>New York, NY</i>)
2017	WU Gutmann Center Symposium on Financial Advice and Asset Management (<i>Vienna, Austria</i>)
2017	Cherry Blossom Financial Education Institute (<i>Washington, DC</i>)
2017	Harvard Law School Roundtable Session on MiFID II (<i>Cambridge, MA</i>)
2016	TIAA Institute Fellows Symposium (<i>New York City, NY</i>)
2016	Northeastern University Finance Conference (<i>Boston, MA</i>)
2016	University of Connecticut Risk Management Conference (<i>Storrs, CT</i>)
2016	Morningstar Institutional Conference (<i>Phoenix, AZ</i>)
2015	Colorado Finance Summit (<i>Vail, CO</i>)
2015	Rodney L. White Center for Financial Research Conference on Financial Decisions and Asset Markets (<i>Philadelphia, PA</i>)
2014	SIFR Workshop on Insurance (<i>Stockholm</i>)
2014	American Finance Association Meetings (<i>Philadelphia, PA</i>)
2013	NBER Behavioral Finance Program Meeting (<i>Chicago, IL</i>)
2012	SIFR Workshop on Mutual Funds (<i>Stockholm</i>)
2012	NBER Conference on State and Local Pensions (<i>Moran, WY</i>)
2012	FIRS Conference (<i>Minneapolis</i>) (2 papers)
2012	HKUST Symposium on Household Finance (<i>Hong Kong</i>)
2011	13 th Annual Retirement Research Consortium Conference (<i>Washington DC</i>)
2011	SFS Finance Cavalcade (<i>Ann Arbor, MI</i>)
2011	Boston College Center for Asset Management Conference on Financial Markets
2011	American Finance Association Meetings (<i>Denver, CO</i>)
2010	NBER Household Finance Summer Institute (<i>Cambridge, MA</i>)
2010	Boston Area Consumer Finance Workshop (<i>Boston Fed</i>)
2008	ICI Academic and Practitioner Conference on Mutual Funds (<i>Baltimore</i>)
2008	Conference on Understanding Economic Decision-Making (<i>Moran, WY</i>)
2008	10 th Annual Retirement Research Consortium Conference (<i>Washington DC</i>)
2007	University of Texas Institutional Investors Conference (<i>Austin, TX</i>)
2006	Financial Media and Investment Decisions: A Comparison of United States and Italian Financial Markets (<i>Università Cattolica Del Sacro Cuore, Milan</i>)
2005	Pacific Northwest Finance Conference (<i>University of Washington</i>)
2005	American Finance Association Meetings (<i>Philadelphia, PA</i>)
2004	Western Finance Association Meetings (<i>Vancouver, British Columbia</i>)
2004	Tuck Conference on Contemporary Corporate Finance Issues III
2004	The Ohio State University/Federal Reserve Bank of New York/ <i>Journal of Financial Economics</i> Conference on Agency Problems and Conflicts of Interest in Financial Intermediaries (<i>Ohio State University</i>)
2004	International Industrial Organization Conference (<i>Chicago, IL</i>)
2003	Pacific Northwest Finance Conference (<i>University of Washington</i>)
2003	EVI Conference on Entrepreneurship, Venture Capital, and Initial Public Offerings (<i>New York University</i>)
2002	Southern Finance Association Meetings (<i>Key West, FL</i>)

Seminar Presentations (*excludes presentations by co-authors*)

2024	Hong Kong Polytechnic University
2023	Dana Hall School

2022	University of Oregon
2021	York University Schulich School of Business (<i>via Zoom</i>)
2021	Boston College Consumer Finance Workshop (<i>via Zoom</i>)
2021	MIT Sloan Faculty Research Seminar (<i>via Zoom</i>)
2021	University of Illinois at Chicago (<i>via Zoom</i>)
2020	University of Arizona (<i>via Zoom</i>)
2020	Rutgers Business Schools
2019	U.S. Securities and Exchange Commission (Commissioner Jackson)
2019	Brandeis University
2019	Wellington Management
2019	University of Illinois at Urbana-Champaign
2018	University of Florida
2018	Bentley University
2016	Georgia State University
2016	Indiana University
2016	Lisbon Finance Seminar
2016	University of Arizona
2016	Analysis Group (<i>Boston</i>)
2015	Rice University
2015	University of Virginia McIntire School of Commerce
2015	Cass Business School (<i>London</i>)
2015	MIT Sloan
2014	Aalto University (<i>Helsinki</i>)
2014	BI Norwegian Business School (<i>Oslo</i>)
2014	The American College (<i>Bryn Mawr, PA</i>)
2014	McGill (<i>Montreal</i>)
2013	Western University (<i>London, ON</i>)
2013	University of Michigan
2012	Boston College Center for Retirement Research
2012	Pompeu Fabra University (<i>Barcelona</i>)
2011	Harvard Finance Seminar
2011	Pennsylvania State University
2010	Federal Reserve Bank of Boston
2009	INSEAD
2007	Boston College
2007	University of Utah
2006	Università Cattolica Del Sacro Cuore (<i>Milan</i>)
2003	Boston College
2003	Federal Reserve Bank of Boston
2003	Federal Reserve Board of Governors
2003	Harvard Business School
2003	Texas A&M
2003	University of Illinois at Urbana-Champaign
2003	University of Oregon
2003	University of Southern California
2003	U.S. Department of Justice
2003	Washington University in St. Louis
2002	MIT Sloan

Discussant

2025	SFS Finance Cavalcade (<i>pending; Hoboken, NJ</i>)
2025	Finance Down Under (<i>Melbourne, Australia</i>)

2024	18th International Conference of Finance UC (<i>Santiago, Chile</i>)
2022	NBER Chinese Economy Working Group (<i>Cambridge, MA</i>)
2022	Northeastern University Finance Conference (<i>Boston, MA</i>)
2021	Financial Research Association Meetings (<i>Las Vegas, NV</i>)
2021	Western Finance Association Meetings (<i>via Zoom</i>)
2020	American Finance Association Meetings (<i>San Diego, CA</i>)
2019	Financial Intermediation Research Society (FIRS) Conference (<i>Savannah, GA</i>)
2018	NBER Conference on Incentives and Limitations of Employment Policies on Retirement Transitions: Comparisons of Public and Private Sectors (<i>Moran, WY</i>)
2018	Fifth Annual Conference on Financial Market Regulation (<i>Washington, DC</i>)
2018	NBER Aging Program Meeting (<i>Cambridge, MA</i>)
2018	American Finance Association Meetings (<i>Philadelphia, PA</i>)
2017	Financial Management Association Meetings (<i>Boston, MA</i>)
2017	University of Oregon Summer Finance Conference (<i>Eugene, OR</i>)
2016	American Finance Association Meetings (<i>San Francisco, CA</i>)
2015	University of Oregon Summer Finance Conference (<i>Eugene, OR</i>)
2015	NBER Household Finance Summer Institute (<i>Cambridge, MA</i>)
2015	Western Finance Association Meetings (<i>Seattle, WA</i>)
2014	NBER Corporate Finance Program Meeting (<i>Cambridge, MA</i>)
2014	16 th Annual Retirement Research Consortium Conference (<i>DC</i>)
2014	NBER Household Finance Summer Institute (<i>Cambridge, MA</i>)
2014	University of Connecticut Risk Management Conference
2014	Household Behavior in Risky Asset Markets: An International Perspective (<i>Harvard Business School</i>)
2013	University of Texas AIM Investment Center Conference on Institutional Investment (<i>Austin, TX</i>)
2013	University of Oregon Conference on Institutional Investors and the Asset Management Industry (<i>Eugene, OR</i>)
2013	SFS Finance Cavalcade (<i>Miami, FL</i>)
2013	American Economic Association Meetings (<i>San Diego, CA</i>)
2012	NBER-Oxford Saïd-CFS-EIEF Conference on Household Finance (<i>Oxford</i>)
2011	NBER Household Finance Summer Institute (<i>Cambridge, MA</i>)
2010	University of Oregon Research Conference in Recognition of the Scholarly Contributions of Larry Y. Dann (<i>Eugene, OR</i>)
2010	4 th Conference on Professional Asset Management (<i>Rotterdam</i>)
2008	American Finance Association Meetings (<i>New Orleans, LA</i>)
2007	Western Finance Association Meetings (<i>Big Sky, MT</i>)
2007	American Finance Association Meetings (<i>Chicago, IL</i>)
2006	Financial Research Association Meetings (<i>Las Vegas, NV</i>)
2006	Western Finance Association Meetings (<i>Keystone, CO</i>)

Session Chair

2021	Boston College Consumer Finance workshop (<i>via Zoom</i>)
2019	SFS Cavalcade (<i>Pittsburgh, PA</i>)
2014	Financial Intermediation Research Society Conference (<i>Quebec City</i>)

Program Committee Member (* denotes one or more gap in service)

2016–present	Colorado Finance Summit
2013–present*	European Finance Association
2013–present*	Financial Intermediation Research Society (FIRS) Conference

2024–present	Financial Management Association
2018–present	SFS Cavalcade
2011–present	Western Finance Association
2023	Rotterdam School of Management Professional Asset Management Conference
2016–2018	Kentucky Finance Conference
2017–2018	Midwest Finance Association
2012–2017	Napa Conference on Financial Markets
2016, 19, 22	University of Texas at Austin AIM Investor Conference
2008	University of Oregon Conference on Institutional Investors and the Asset Management Industry
2006	University of Oregon Conference on Corporate Finance
2004	University of Oregon Conference/ <i>Journal of Financial Economics</i> on Delegated Portfolio Management

Conference Co-Chair

2015–2021	Boston College Carroll School of Management Finance Conference
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Selection Committee Member

2014, 2015	TIAA-CREF Paul A. Samuelson Award for Outstanding Scholarly Writing on Lifelong Financial Security
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Editorial Positions

7/2021–present	Associate Editor at <i>Journal of Financial Economics</i>
2013–present	Editorial Board Member at <i>Journal of Pension Economics and Finance</i>

Referee (ad hoc)	<i>American Economic Journal: Applied Economics; American Economic Review; Economics Letter; Economic Inquiry; European Journal of Finance; Financial Management; Journal of Banking and Finance; Journal of Consumer Affairs; Journal of Corporate Finance; Journal of Economic Behavior and Organization; Journal of Empirical Finance; Journal of European Economic Association; Journal of Finance; Journal of Financial and Quantitative Analysis; Journal of Financial Economics; Journal of Financial Intermediation; Journal of Financial Services Research; Journal of Law, Economics, and Organization; Journal of Marketing Research; Journal of Pension Economics and Finance; Journal of Public Economics; Journal of Retirement; Journal of Wine Economics; Management Science; Quarterly Journal of Economics; Review of Asset Pricing Studies; Review of Economic Studies; Review of Economics and Statistics; Review of Finance; Review of Financial Studies; Scandinavian Journal of Economics; Southern Economic Journal; The Financial Review</i>
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Reviewer (ad hoc)	Austrian Science Fund, AXA Research Fund, Israel Science Foundation, National Science Foundation, Research Grant Council of Hong Kong
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PUBLIC TESTIMONY

2015	Public Hearing on the Department of Labor's Conflict of Interest Proposed Rule, Panel 8 (focused on the DOL's Regulatory Impact Analysis)
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CONSULTING

2023–2025	Expert Witness for Defendant in Waldner v. Natixis ERISA Lawsuit No. 21-vs-10273 (authored two expert reports; gave deposition testimony; testified in court)
2022–2023	Expert Witness for Defendant in re Quest Diagnostic ERISA Lawsuit No. 20-cv-07936 (authored two expert reports and gave deposition testimony)
2019–2020	Expert Witness for Defendant in Moitoso v. Fidelity ERISA Lawsuit No. 18-cv-12122 (authored two expert reports and gave deposition testimony)
2017–2018	Expert Witness for Defendant in Davis New York Venture Fund Fee Litigation No. 14-cv-4318 (authored one expert report and gave deposition testimony)
2017–2018	Gratuitous Services Agreement with United States Securities and Exchange Commission (SEC) Division of Economic and Risk Analysis (DERA)
2016–2021	Financial Modeling for Naspers Limited / Prosus Services B.V.

TEACHING EXPERIENCE

Boston College, Carroll School of Management, Department of Finance

Data Analytics in Finance (Undergraduate & Masters)	Fall '18 '19 '20 '22 '23 '24
Research Topics in Finance (PhD; 1-2 week module)	Fall '20 '22 '24 Spring '24
Basic Finance (Undergraduate)	Spring '11 '12 '13 '14 '15 '16 '17 '18
Corporate Finance (Undergraduate)	Fall '08 '09
Financial Management (Evening MBA)	Spring '11 '12 '13 '14 '15
Corporate Finance (Evening MBA)	Fall '08 '09

University of Oregon, Lundquist College of Business, Department of Finance

Doctoral Seminar in Corporate Finance	Spring '05 '07
Corporate Finance (First-Year MBA)	Winter '06 '07 '08
Honors Financial Management (Undergraduate)	Winter '05 '06 '07 '08
Financial Management (Undergraduate)	Winter '04 '05 '06 & Spring '04 '05 '06 '07 '08

Massachusetts Continuing Legal Education, Inc. (MCLE)

Finance Bootcamp (three hours)	April '18
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TEACHING AWARDS

2007–2008	James E. Reinmuth MBA Teaching Excellence Award (1 st year class)
Winter 2007	Business Advisory Council Undergraduate Teaching Award
2019–2020	Carroll School of Management Coughlin Distinguished Teaching Award

SERVICE TO BOSTON COLLEGE

2008–present	Faculty Recruiting Committee Member
2010–present	Undergraduate Faculty Advisor
2015–present	Co-Chair of Boston College Carroll School of Management Finance Conference
2008–2010	External Finance Department Seminar Series Organizer

2010–2014	Portico Guest Lecturer
2020–2021	Finance Department PhD Admission Committee Member
2009–2011	Dissertation Committee Member for Viktor Fedaseyeu (Bocconi, CEIBS)
2010–2012	Dissertation Committee Member for Lee Cohen (University of Georgia)
2014–2015	Dissertation Committee Member for Matt Osborn (Cornerstone Research)
2013–2016	Dissertation Committee Chair for Bianca Werner (OCC)
2014–2016	Dissertation Committee Member for Saeid Hoseinzade (Suffolk)
2014–2017	Dissertation Committee Member for Tray Spilker (University of Hawaii)
2016–2017	Dissertation Committee Member for Yuyuan Zhu (T. Rowe Price)
2018–2019	Dissertation Committee Member for Siyi Chen (Chinese University of Hong Kong, Shenzhen)
2020–2021	Dissertation Committee Member for Xiang Zheng (University of Connecticut)
2022–2023	Dissertation Committee Member for Jingxuan “Michael” Zhang (University of Alberta)
2023–2024	Dissertation Committee Member for Jinyoung “Danielle” Kim
2023–2025	Dissertation Committee Member for Tommaso Tamburelli (Cornerstone Research)