

# Steven Utke

## Address

School of Business  
Department of Accounting  
University of Connecticut  
2100 Hillside Road, Unit 1041A  
Storrs, CT 06269

## Contact Information

Email: [sutke@uconn.edu](mailto:sutke@uconn.edu)  
Office: BUSN 439  
Phone: (860) 486-2374  
Fax: (860) 486-4838

## ACADEMIC EXPERIENCE

### University of Connecticut

Associate Professor	Storrs, CT
Arthur Andersen, LLP Accounting Professor	August 2021-Present
Assistant Professor	August 2021-Present

Assistant Professor August 2015-July 2021

Internal Revenue Service	Hartford, CT
Research, Applied Analytics, and Statistics (RAAS) Volunteer	March 2020-January 2025

## EDUCATION

University of Georgia, PhD, Business Administration	May 2015
Villanova University, Master of Taxation	August 2011
Bucknell University, BSBA, Accounting	May 2005

## RESEARCH

### Refereed Publications

1. “Private equity fund reporting quality, external monitors, and third-party service providers” with Peter D. Easton, Stephannie A. Larocque, and Paul Mason, 2025. *The Accounting Review* 100 (3): 187-219. <https://doi.org/10.2308/TAR-2023-0291>
  - **Invited presentations:** 2022 Institute for Private Capital (IPC) Spring Research Symposium, 2023 University of North Texas Accounting Research Conference \*
  - **Media coverage:** Regulatory Compliance Watch, September 8, 2022 (link below)
2. “Does financial reporting for income tax expense affect the timeliness of goodwill impairments?” with Zachary King, Daniel P. Lynch, and Bridget Stomberg, 2025. *Journal of Financial Reporting* 10 (1): 45-71. <https://doi.org/10.2308/JFR-2023-005>
  - **Invited presentations:** 2019 University of North Texas Accounting Research Conference \*, 2019 Temple/Calgary Conference on the Convergence of Financial and Managerial Accounting Research, 2019 Midwest Accounting Research Conference (MARC) \*, 2019 AAA Annual Meeting \*, 2019 AAA Midwest Region Meeting \*, 2022 Hawaii Accounting Research Conference (HARC) \*, 2022 AAA FARS Midyear Meeting \*, 2022 *Journal of Financial Reporting* Improving Financial Reporting Conference \*
  - **Workshop presentations:** University of Akron (2019)

\* Presentation by co-author

## **RESEARCH (Continued)**

---

### **Refereed Publications (Continued)**

3. “Understanding private equity funds: A guide to private equity research in accounting” with Maria Nykyforovych Borysoff and Paul Mason, 2024. *Journal of Financial Reporting* 9 (1): 21-49. <https://doi.org/10.2308/JFR-2022-012>
  - **Invited presentations:** 2022 *Journal of Financial Reporting* Mini-Conference
  - **Media coverage:** Phys.org, October 4, 2023 <https://phys.org/news/2023-10-professor-accounting-fast-changing-economy.html>
4. “Structural equation modeling in archival capital markets research: An empirical application to disclosure and cost of capital” with Lisa A. Hinson, 2023. *Journal of Financial Reporting*, 8 (2): 87-130. <https://doi.org/10.2308/JFR-2019-0021>
  - **Invited presentations:** 2015 FARS Midyear Meeting\*, 2016 Modern Modeling Methods Conference
5. “Does tax deductibility affect goodwill impairment decisions?” with Sarah Khalil and Miles Romney, 2023. *The Journal of the American Taxation Association* 45 (2): 117-146. <https://doi.org/10.2308/JATA-2021-004>
  - **Invited presentations:** 2016 Temple Accounting Conference, 2016 AAA Northeast Region Meeting\*, 2016 NTA Annual Conference on Taxation, 2017 AAA FARS Midyear Meeting, 2017 ATA Midyear Meeting, 2017 BYU Accounting Research Symposium\*, 9<sup>th</sup> EIASM Conference on Current Research in Taxation (2019)\*, 2021 Hawaii Accounting Research Conference (HARC)
  - **Workshop presentations:** Baylor University (2017), University of Arkansas (2020)
6. “Private equity fund pricing in secondary markets: Effects of taxes and fund structure” with Paul Mason, 2023. *Journal of Alternative Investments* 25 (4): 50-59. <https://doi.org/10.3905/jai.2023.1.182>
  - **Reprints:** “Practical applications of private equity fund pricing in secondary markets: Effects of taxes and fund structure” *Practical Applications* June 26, 2023 <https://doi.org/10.3905/pa.2023.jipa069>
7. “Attention to dividends, inattention to earnings?” with Charles G. Ham and Zachary R. Kaplan, 2023. *Review of Accounting Studies* 28 (1): 265-306. <https://doi.org/10.1007/s11142-021-09642-4>
  - **Invited presentations:** 2019 AAA Midwest Region Meeting\*, 2019 Nick Dopuch Accounting Research Conference\*, 2020 AAA Annual Meeting\*
  - **Other coverage:** Columbia Law School’s Blue Sky Blog, October 4, 2021 <https://clsbluesky.law.columbia.edu/2021/10/04/attention-to-dividends-inattention-to-earnings/>
8. “Market and firm reaction to targeted tax benefits: Evidence from the Tax Reform Act of 1986” with Jennifer Luchs-Nuñez and George A. Plesko, 2022. *The Journal of the American Taxation Association* 44 (2): 115-136. <https://doi.org/10.2308/JATA-19-016>
  - **Invited presentations:** 2018 AAA Northeast Region Meeting\*

---

\* Presentation by co-author

## **RESEARCH (Continued)**

---

### **Refereed Publications (Continued)**

9. “Investor taxes and option prices” with Paul D. Mason, 2022. *The Journal of the American Taxation Association* 44 (2): 77-96. <https://doi.org/10.2308/JATA-2020-003>
  - **Invited presentations:** 2018 NTA Annual Conference on Taxation\*, 2019 ATA Midyear Meeting\*
10. “Do debt investors adjust financial statement ratios when financial statements fail to reflect economic substance? Evidence from cash flow hedges” with John L. Campbell, Jenna D’Adduzio, and Jimmy F. Downes, 2021. *Contemporary Accounting Research* 38 (3): 2302-2350. <https://doi.org/10.1111/1911-3846.12656>
  - **Invited presentations:** 2017 AAA Southeast Region Meeting\*, 2017 Fordham Global PhD Colloquium\*, 2017 Temple/Calgary Conference on the Convergence of Financial and Managerial Accounting Research, 2017 Southeast Summer Accounting Research Conference (SESARC)\*, 2017 AAA Annual Meeting\*, 2018 FARS Midyear Meeting\*, 2019 *Contemporary Accounting Research* Conference\*
11. “Common institutional ownership and earnings management” with Santhosh Ramalingegowda and Yong Yu, 2021. *Contemporary Accounting Research* 38 (1): 208-241. <https://doi.org/10.1111/1911-3846.12628>
  - **Awards:** *CAR* Top 10 Most Downloaded Article in first 12 months of publication (among articles published online in 2019 and 2020); *CAR* Top Cited Article (among articles published in the 2021 or 2022 issues)
12. “Why pay our fair share? How perceived influence over laws affects tax evasion” with Paul D. Mason and Brian M. Williams, 2020. *The Journal of the American Taxation Association* 42 (1): 133-156. <https://doi.org/10.2308/atax-52598>
  - **Invited presentations:** 2018 ATA Midyear Meeting
  - **Awards:** *JATA* 2020 Outstanding Paper Award
13. “Audit quality and specialist tenure” with Jennifer J. Gaver, 2019. *The Accounting Review* 94 (3): 113-147. <https://doi.org/10.2308/accr-52206>
  - **Invited presentations:** 2014 Auditing Midyear Meeting, 2014 AAA Southeast Region Meeting, 2014 AAA Annual Meeting
  - **Workshop presentations:** University of Connecticut (2015)
14. “The effect of shareholder-level taxes on organizational form and stock ownership: Evidence from equity carve-outs of master limited partnerships” 2019. *The Accounting Review* 94 (1): 327-351. <https://doi.org/10.2308/accr-52161>
  - **Dissertation committee:** Benjamin Ayers (Chair), Stuart Gillan, Santhosh Ramalingegowda, Casey Schwab, Bridget Stomberg
  - **Invited presentations:** 2015 NTA Spring Symposium
  - **Job market presentations (2015):** Boston College, University of Connecticut, Indiana University, University of Kansas, University of Notre Dame, Pennsylvania State University

---

\* Presentation by co-author

## **RESEARCH (Continued)**

---

### ***Refereed Publications (Continued)***

15. “Tax policy and organizational form: Assessing the effects of the Tax Cuts and Jobs Act of 2017” with Erin Henry and George A. Plesko, 2018. *National Tax Journal* 71 (4): 635-660. <https://doi.org/10.17310/ntj.2018.4.03>
  - **Invited presentations:** 2018 NTA Spring Symposium\*
16. “Miscodings in Compustat’s auditor variable: Issues, identification, and correction” 2018. *Advances in Accounting* 43: 56-59. <https://doi.org/10.1016/j.adiac.2018.09.002>
17. “Does shareholder voting matter? Evidence from the takeover market” with Paul Mason, Usha Rodrigues, and Mike Stegemoller, 2018. *Wake Forest Law Review* 53 (1): 157-209.
  - **Invited presentations:** 2017 MFA Annual Meeting
18. “Noncompliance with mandatory disclosure requirements: The magnitude and determinants of undisclosed permanently reinvested earnings” with Benjamin C. Ayers and Casey M. Schwab, 2015. *The Accounting Review* 90 (1): 59-93. <https://doi.org/10.2308/accr-50853>
  - **Invited presentations:** 2013 Illinois Tax Doctoral Consortium

### ***Invited Articles and Chapters***

1. “Private equity secondary markets” with Paul Mason, 2025. *The Palgrave Encyclopedia of Private Equity* edited by Douglas Cumming and Benjamin Hammer. [https://doi.org/10.1007/978-3-030-38738-9\\_62-1](https://doi.org/10.1007/978-3-030-38738-9_62-1)
2. “Monitoring in private equity” with Peter Easton, Stephannie Larocque, and Paul Mason, 2025. *The Palgrave Encyclopedia of Private Equity* edited by Douglas Cumming and Benjamin Hammer. [https://doi.org/10.1007/978-3-030-38738-9\\_116-1](https://doi.org/10.1007/978-3-030-38738-9_116-1)

### ***Working Papers***

1. “Does mandatory disclosure matter for private equity funds?” with Feng Jiang, Paul Mason, and Yiming Qian, 2025. Under review at *Management Science*
  - **Invited presentations:** 2023 FARS Midyear Meeting\*, 2023 Bretton Woods Accounting and Finance Conference, 2023 Private Equity Research Consortium (PERC) Spring Symposium at Oxford\*
2. “Whose taxes matter for dividend payout policy? Insiders versus institutional owners” with Trent Krupa, 2024. Revising for second round review at *Review of Accounting Studies*
  - **Invited presentations:** 2019 ATA Midyear Meeting\*, 2019 NTA Annual Meeting\*, 2019 Conference on Financial Economics and Accounting (CFEA), 2021 FMA Annual Meeting, 2022 Eastern Finance Association Annual Meeting
  - **Workshop presentations:** Michigan State University (2021)
3. “Audit partners’ cumulative industry experience and audit quality” with Naman Desai, Barry Mishra, and Siddharth Purohit, 2025. Under second round review at *Journal of Business Finance and Accounting*
  - **Invited presentations:** 2024 FARS Midyear Meeting\*

---

\* Presentation by co-author

## **RESEARCH (Continued)**

---

### **Working Papers (Continued)**

4. “The consequences of private equity investment in accounting firms” with Tuan Doan, Ying Zhou, and Youli Zou, 2025.
  - **Invited Presentations:** Fifth Labor and Accounting Conference (2025)\*
5. “SEC oversight of private equity and hedge funds” with Owen Davidson, Paul Mason, and Nina Xu, 2025. Under review at *Journal of Accounting and Economics*
  - **Invited presentations:** 2025 Institute for Private Capital (IPC) Spring Research Symposium, 2025 European FMA\*, 2025 Temple/Calgary Accounting Research Conference\*
  - **Workshop presentations:** University of Denver (2025)
6. “Does accounting matter for capital formation? Determinants and consequences of private equity fund financial reporting choices” with Jennifer J. Gaver and Paul Mason, 2023.
  - **Invited presentations:** 2018 Auditing Midyear Meeting\*, 2018 Temple Accounting Conference
  - **Workshop presentations:** University of Massachusetts – Amherst (2018), University of Florida (2018), University of Wisconsin – Madison (2018)
  - **Media coverage:** Regulatory Compliance Watch, September 8, 2022 (link below)
  - **Other coverage:** Columbia Law School’s Blue Sky Blog, January 17, 2018  
<https://clsbluesky.law.columbia.edu/2018/01/17/financial-reporting-choices-of-large-private-firms/>
7. “Hidden in plain sight: Variation in information content of tax disclosures by footnote location” with Rita Gunn, Miles Romney, and Mitch Stanton, 2019.
  - **Invited presentations:** 2019 BYU Accounting Research Symposium\*
8. “The cost of misaligned incentives: Evidence from the funding sources and real effects of tax-motivated dividends” with Kose John and Trent Krupa, 2025.
  - **Invited presentations:** 2019 AAA Northeast Region Meeting\*, 2020 ATA Midyear Meeting\*, 10<sup>th</sup> EIASM Conference on Current Research in Taxation (2020)\*, 2020 NTA Annual Conference on Taxation\*, 2022 Virginia Tech Accounting Research Conference, 2024 Utah Public Finance Invitational (UPFIN) Conference
  - **Workshop presentations:** Norwegian School of Economics (2021)
  - **Awards:** Best Doctoral Student Paper (2019 AAA Northeast Region Meeting)
9. “Can audit industry market share be bought? Evidence from audits in the private equity and hedge fund industry” with Paul Mason, 2024.
  - **Invited presentations:** 2020 Auditing Midyear Meeting\*
  - **Workshop presentations:** University of Georgia (2019), Clemson University (2024), George Mason University (2024)

---

\* Presentation by co-author

## **RESEARCH (Continued)**

---

### ***Working Papers (Continued)***

10. “Many datasets do not include ‘firm-level’ data: Implications for finance, economics, and accounting research” with Paul Mason, 2024.
11. “Do corporate taxes impede merger and acquisition activity? Evidence from private corporations” with Nathan Born, Erin Henry, and Jennifer Luchs-Nuñez, 2023.
  - **Invited presentations:** 2021 NTA Spring Symposium\*, 2021 NTA Annual Meeting\*, 2022 Utah Tax Invitational (UTAXI)\*, 2022 Colorado Accounting Research Symposium (CARS)\*
12. “Mark-to-market (or wealth) taxation in the U.S.: Evidence from options” with Paul Mason, 2021.
  - **Invited presentations:** 2021 Auckland Centre for Financial Research (ACFR) Conference on Derivative Markets, 2021 NTA Annual Meeting, 2022 Eastern Finance Association Annual Meeting
13. “Determinants of corporate organizational structure” with Ashish Agarwal and Shannon Chen, 2025.
14. “The benefits of uncertainty: Uncertain tax strategies and implicit taxes” with Trent Krupa and Brian Williams, 2023.
  - **Invited presentations:** 2022 AAA Annual Meeting\*
  - **Workshop presentations:** University of Missouri (2022)
15. “Organizational form choice for private equity-backed portfolio companies” with Paul Mason, 2025.
  - **Invited presentations:** 2024 Central Texas Tax Symposium (CTTS), 2024 NTA Annual Conference on Taxation, 2025 Eastern Finance Association Annual Meeting
16. “Textual analysis of private equity fund mandatory SEC filings: Evidence from ESG disclosures and fundraising outcomes” with John Campbell, Owen Davidson, and Paul Mason, 2024. Under second round review at *Contemporary Accounting Research*
  - **Invited presentations:** 2023 Oxford Sustainable Private Markets Conference\*, 2024 Utah Winter Accounting Conference (UWAC), 2024 AAA Annual Meeting\*
17. “New insight into oversight: Institutional investor monitoring and tax avoidance” with Adrienne DePaul, 2023.
  - **Invited presentations:** 2023 NTA Annual Meeting\*
18. “Sins of the father: The effect of parent firms’ financial misconduct on current and former subsidiaries” with Alina Lerman and Jingyu Xu, 2023.
  - **Invited presentations:** 2020 AAA Annual Meeting\*, 2023 FARS Midyear Meeting\*, 2023 Temple/Calgary Accounting Conference, Villanova University Fall 2023 Accounting Mini-Conference\*
19. “How do auditors facilitate intra-industry information transfer? Evidence from industry specialists and shared auditors” with Alina Lerman and Jingyu Xu, 2025.
  - **Invited presentations:** 2025 Temple/Calgary Accounting Research Conference

---

\* Presentation by co-author

## **RESEARCH (Continued)**

---

### ***Other Papers***

1. “There is no carried interest loophole” 2025
  - **Invited Presentations:** 2025 Private Equity Research Consortium (PERC) Spring Symposium at Oxford
  - **Other coverage:** TaxProf Blog, July 12, 2024  
[https://taxprof.typepad.com/taxprof\\_blog/2024/07/weekly-ssrn-tax-article-review-and-roundup-narotzki-reviews-utkes-there-is-no-carried-interest-loophole.html](https://taxprof.typepad.com/taxprof_blog/2024/07/weekly-ssrn-tax-article-review-and-roundup-narotzki-reviews-utkes-there-is-no-carried-interest-loophole.html), Columbia Law School’s Blue Sky Blog, July 15, 2024  
<https://clsbluesky.law.columbia.edu/2024/07/15/there-is-no-carried-interest-loophole/>, Wealth Strategies Journal Blog, July 16, 2024  
<https://wealthstrategiesjournal.com/2024/07/16/the-wealth-strategies-journal-daily-download-july-16-2024/>
2. “Reproducibility in Management Science” with the *Management Science* Reproducibility Collaboration, 2024. *Management Science* 70 (3): 1343-1356.  
<https://doi.org/10.1287/mnsc.2023.03556>
3. “Commentary on the SEC’s proposal to mandate private fund adviser audits” with Paul Mason, 2022.
  - **Media coverage:** Regulatory Compliance Watch, September 8, 2022 (link below)
4. “Do seasoned industry specialists provide higher audit quality? A response” with Jennifer J. Gaver, 2021.
5. “Propensity score matching with replacement using weighted least squares: SAS code and macros” 2019.
6. “Calculating auditor industry specialist tenure: Code from Gaver and Utke (2019)” 2019.

## **MEDIA CITATIONS**

---

- NBC Connecticut (WVIT), 1/23/2023: “CT Professor Talks About Upcoming Tax Season”
  - <https://www.nbcconnecticut.com/news/local/ct-professor-talks-about-upcoming-tax-season/2960287/>
- Regulatory Compliance Watch, 9/8/2022: “Professor: PF audits cost much, do little”
  - <https://www.regcompliancewatch.com/professor-pf-audits-cost-much-do-little/>
  - Based on multiple private equity papers noted above
- Marketplace, 1/17/2022: “Report details widening pandemic-era wealth gap”
  - <https://www.marketplace.org/story/2022/01/17/report-details-widening-pandemic-era-wealth-gap>
  - Based on “Mark-to-market (or wealth) taxation in the U.S.: Evidence from options”
- Marketplace, 11/9/2021: “Why is it so difficult for the U.S. to implement a wealth tax?”
  - <https://www.marketplace.org/2021/11/09/why-is-it-so-difficult-for-the-u-s-to-implement-a-wealth-tax/>
  - Based on “Mark-to-market (or wealth) taxation in the U.S.: Evidence from options”

## **CONFERENCE ATTENDANCE AND PAPER PRESENTATIONS**

---

### ***Accounting – Journal Conferences (reverse chronological order)***

- *Contemporary Accounting Research Conference*, 2019-2024
- *Review of Accounting Studies Conference*, 2020, 2022-2023
- *Journal of Financial Reporting Mini-Conference*, 2021-2022
  - **Presenter:** 2022
- *Journal of Business Finance & Accounting Conference*, 2021

### ***Accounting – University Conferences (reverse chronological order)***

- Temple/Calgary Accounting Research Conference, 2016-2019, 2023, 2025
  - **Presenter:** 2016-2019, 2023, 2025                   **Discussant:** 2019 (x2), 2023
- UNH Bretton Woods Accounting and Finance Conference, 2023, 2025
  - **Presenter:** 2023   **Discussant:** 2025
- Yale School of Management Summer Research Conference, 2017-2022, 2024-2025
- University of Illinois Young Scholars Research Symposium, 2021, 2023, 2025
- Utah Winter Accounting Conference (UWAC), 2024
  - **Presenter:** 2024
- Central Texas Tax Symposium, 2024
  - **Presenter:** 2024
- Kellogg Accounting Conference, 2024
- New England Accounting Research Symposium (NEARS), 2024
- UNC Tax Symposium, 2015, 2020-2023
- Vanderbilt Music City Accounting Conference, 2023
- North Carolina State Risk Governance Research Symposium, 2023
- Norwegian Tax Accounting Symposium, 2021-2022
- Virginia Tech Accounting Research Conference, 2018, 2022
  - **Presenter:** 2022
- Yale School of Management Fall Research Conference, 2015-2017, 2021
- University of Illinois Symposium on Tax Research, 2013, 2021
- Hawaii Accounting Research Conference, 2021
  - **Presenter:** 2021   **Discussant:** 2021
- Nick Dopuch Accounting Research Conference (at Wash. U.), 2018-2021
- UT-Austin/Waterloo Biennial Taxation Research Symposium, 2014, 2016, 2020
- University of Illinois Symposium on Auditing Research, 2020
- WHU Young Scholar Tax Conference, 2020
- Conference on Financial Economics and Accounting (CFEA), 2019
  - **Presenter:** 2019
- Modern Modeling Methods Conference (at UConn), 2016
  - **Presenter:** 2016
- Southeast Summer Accounting Research Conference (SESARC), 2014-2015
- University of Illinois Tax Doctoral Consortium, 2013
  - **Presenter:** 2013

## **CONFERENCE ATTENDANCE AND PAPER PRESENTATIONS (Continued)**

---

### ***Accounting – Association, Firm, and Government Conferences (reverse chronological order)***

- AAA FARS Midyear Meeting, 2017, 2020-2021, 2025
  - **Presenter:** 2017 **Discussant:** 2020 (x2), 2021
- PCAOB Conference on Auditing and Capital Markets, 2017-2020, 2025
- Auditing Midyear Meeting, 2014, 2019, 2025
  - **Presenter:** 2014
- IRS/TPC Joint Research Conference on Tax Administration, 2021-2022, 2025
- Ernst & Young Tax Educator's Symposium, 2016, 2020-2025
- FASB Emerging Financial Reporting Issues Research Symposium, 2024
- NTA Annual Conference on Taxation, 2015-2017, 2020-2021, 2024
  - **Presenter:** 2016, 2021, 2024 **Discussant:** 2017 (x4), 2020, 2021 (x2)
- NTA and ATPI Spring Symposium, 2015, 2018, 2021, 2024
  - **Presenter:** 2015
- Conference on Financial Market Regulation, 2024
- Office of Tax Analysis (U.S. Treasury) Research Conference, 2021, 2023
- ATA Midyear Meeting and JATA Conference, 2011-2019
  - **Presenter:** 2017-2018 **Discussant:** 2016, 2019
- KPMG/ATA Doctoral Consortium, 2012, 2014, 2018
  - **Presenter:** 2018
- AAA Annual Meeting, 2014-2016
  - **Presenter:** 2014 **Discussant:** 2014-2015
- AAA New Faculty Consortium, 2016
- PwC Accounting & Tax Symposium, 2016
- KPMG Faculty Symposium, 2016
- Deloitte Tax Faculty Symposium, 2016
- TCPI Annual Tax Policy and Practice Symposium, 2016
- AAA Southeast Region Meeting, 2014
  - **Presenter:** 2014
- AAA/Deloitte/J. Michael Cook Doctoral Consortium, 2013

### ***Finance and Economics (reverse chronological order)***

- Private Equity Research Consortium (PERC) Spring Symposium at Oxford, 2025
  - **Presenter:** 2025
- Institute for Private Capital (IPC) Spring Research Symposium, 2020-2025
  - **Presenter:** 2022, 2025
- Institute of Entrepreneurship and Private Capital (IEPC) Private Capital Symposium, 2025
- Eastern Finance Association Annual Meeting, 2022, 2025
  - **Presenter:** 2022 (x2), 2025 **Discussant:** 2022, 2025
- Utah Winter Finance Conference (UWFC), 2018-2024
- Utah Public Finance Invitational (UPFIN) Conference, 2024
  - **Presenter:** 2024

## **CONFERENCE ATTENDANCE AND PAPER PRESENTATIONS (Continued)**

---

### ***Finance and Economics (Continued)***

- Arizona State Sonoran Winter Finance Conference, 2023-2024
- University of Connecticut Finance Conference, 2018-2024
- VOYA Financial Colloquium, 2023
- Mid-Atlantic Research Conference (MARC), 2022
- FMA Annual Meeting, 2017, 2021
  - **Presenter:** 2021 **Discussant:** 2021
- ACFR Conference on Derivative Markets, 2021
  - **Presenter:** 2021 **Discussant:** 2021
- MFA Annual Meeting, 2017
  - **Presenter:** 2017

## **TEACHING**

---

- PhD Seminar – Tax Research
  - 4 students
  - Information for semesters prior to 2020 is available upon request
- Federal Income Taxes
  - 56 undergraduate students; GPA: 3.0, Instructor Evaluations: 4.2/5.0
  - 40 undergraduate students; GPA: 2.9, Instructor Evaluations: 3.8/5.0
  - 39 undergraduate students; GPA: 2.9, Instructor Evaluations: 4.4/5.0
  - 74 undergraduate students; GPA: 2.9, Instructor Evaluations: 4.4/5.0
  - 62 undergraduate students; GPA: 2.5, Instructor Evaluations: 4.7/5.0
    - Provost Office Recognition for “Excellence in Teaching”
  - Information for semesters prior to 2020 is available upon request
- Principles of Managerial Accounting
  - 39 undergraduate students; GPA: 3.2, Instructor Evaluations: 5.0/5.0
- SAS/STATA Software Boot Camp
  - Information for semesters prior to 2020 is available upon request
- Guest Lectures
  - University of Iowa (PhD), Harvard University (undergraduate)

## **PROFESSIONAL EXPERIENCE**

---

<b>LS Power Development, LLC</b>	<b>East Brunswick, NJ</b>
Tax Manager; Tax Senior	December 2008 – May 2011
<b>Ernst &amp; Young, LLP</b>	<b>Philadelphia, PA</b>
Senior Tax Associate; Staff Tax Associate	May 2007 – December 2008
<b>Ernst &amp; Young, LLP</b>	<b>Philadelphia, PA</b>
Staff Auditor	September 2005 – May 2007
<b>Certified Public Accountant – Pennsylvania and New Jersey</b>	2007 – Present

## **GRANTS, AWARDS, AND HONORS**

---

- Center for Private and Entrepreneurial Capital (CPEC) Grant (\$10,000), 2024
- Center for Private and Entrepreneurial Capital (CPEC) Grant (\$10,000), 2023
- UConn School of Business Research Excellence Award, 2022
- *JATA* Outstanding Paper Award, 2020
- Voynich Family Graduate Fellowship (University of Georgia), 2014
- Dr. Linda S. Bamber Scholarship (University of Georgia), 2012
- Elijah Watt Sells Award – Top 10 CPA Exam Score (AICPA), 2005
- CPA Exam Award – Top CPA Exam Score in Pennsylvania (PICPA), 2005
- Bobby Pangburn Memorial Award (Bucknell University Football), 2004
- George V. McGee Investment Studies Scholarship (Bucknell University), 2004

## **RESEARCH SERVICE**

---

- Editor/Associate Editor:
  - *Journal of International Accounting Research* (2024-2027)
- Editorial Boards (alphabetically):
  - *The Accounting Review* (2020-Present)
  - *The Journal of the American Taxation Association* (2019-2022)

## **RESEARCH SERVICE (Continued)**

---

- Ad Hoc Reviewer Service, Excluding Editorial Board Service Times (alphabetically):
  - *Accounting Horizons* (2021-2022)
  - *The Accounting Review* (2017-2019)
  - *Auditing: A Journal of Practice and Theory* (2019, 2021, 2024)
  - *Contemporary Accounting Research* (2018-2021, 2023-2024)
  - *Corporate Governance: An International Review* (2024)
  - *Journal of Accounting, Auditing and Finance* (2018, 2022)
  - *Journal of Accounting and Economics* (2025)
  - *Journal of Accounting Research* (2024)
  - *The Journal of the American Taxation Association* (2017-2018, 2023)
  - *Journal of Business Finance and Accounting* (2019, 2022-2024)
  - *Journal of Corporate Finance* (2017, 2021-2022)
  - *Journal of Empirical Finance* (2023)
  - *Journal of Management Accounting Research* (2019)
  - *Management Science* (2021, 2023)
  - *Review of Accounting Studies* (2021-2024)
  - AAA FARS Midyear Meeting (2017-2024)
    - Excellence in Reviewing Award: 2017-2018, 2020
  - AAA Auditing Midyear Meeting (2014, 2018, 2020-2022)
  - ATA Midyear Meeting (2014-2021)
  - AAA Annual Meeting (2014, 2017-2018, 2020, 2022, 2025)
  - AAA Midwest Region Meeting (2019)
  - AAA Northeast Region Meeting (2016, 2018)
  - AAA Southeast Region Meeting (2014)
  - Hawaii Accounting Research Conference (2020, 2025)
  - Hong Kong Research Grants Council (2023-2025)
- Research Conference Committee Service:
  - Bretton Woods Accounting and Finance Ski Conference (2025-present)
- ATA Research Resources and Methodologies Committee, 2013-2014; 2015-2016; 2018-2021
- ATA/KPMG Tax Doctoral Consortium Committee, 2017-2018
- FARS Best Paper Award Committee, 2021-2022
- FARS Mentorship Program, 2023-2024

## **Ph.D. COMMITTEE SERVICE**

---

- Adrienne DePaul (chair), 2025 Initial Placement: University of Tennessee
- Vernan Rivera (chair), 2024 Initial Placement: Bucknell University
- Bo Ren, 2024 Initial Placement: University of Akron
- Jingyu Xu, 2024 Initial Placement: Claremont McKenna College
- Trent Krupa (co-chair), 2022 Initial Placement: University of Arkansas
  - Awarded 2021 Deloitte Doctoral Fellowship
- Jenny Luchs-Nuñez, 2022 Initial Placement: Colorado State University
- Andy Duxbury, 2016 Initial Placement: James Madison University

## **UNIVERSITY, SCHOOL, AND DEPARTMENT SERVICE**

---

- Accounting Department PhD Program Committee, 2016-Present
- Accounting Department Promotion, Tenure, and Reappointment Committee, 2021-Present
- Accounting Department Scholarship Committee, 2025
- Accounting Department Tenure-Track Recruiting Committee, 2020-2022
- Accounting Department Undergraduate Curriculum Committee, 2025
- Accounting Department Workshop Coordinator, 2017-2019
- Accounting Department Honors Thesis Supervisor, 2018, 2020-2021
- School of Business Internal Workshop Coordinator, 2021-2024

## **PROFESSIONAL ORGANIZATIONS**

---

- American Accounting Association (AAA) 2011-Present
- American Finance Association (AFA) 2015-Present
- American Economic Association (AEA) 2020-Present
- American Taxation Association (ATA) 2011-2021
- National Tax Association (NTA) 2015-Present
- AAA Financial Accounting and Reporting Section (FARS) 2018-Present
- AAA Auditing Section 2018-Present
- Financial Management Association (FMA) 2019-Present
- American Institute of CPAs (AICPA) 2005-Present
- Pennsylvania Institute of CPAs (PICPA) 2005-Present
- New Jersey Society of CPAs (NJCOPA) 2005-Present