

Greg Geisler, PhD, CPA (up to date as of January, 2019)

Indiana University (Bloomington), Kelley School of Business, Clinical Professor of Accounting
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WORK EXPERIENCE, EDUCATION and PROFESSIONAL CERTIFICATION

Professor, University of Missouri-St. Louis (UMSL) 2017 – 2018
Associate Professor, UMSL, 2006 – 2017; Assistant Professor, UMSL, 2002 – 2006.
Visiting Assistant Professor, Indiana University-Bloomington 2001 – 02
Assistant Professor, Georgia State University 1995 – 2001
Ph.D., Accounting, University of North Carolina at Chapel Hill 1995
Lecturer, University of North Carolina at Chapel Hill 1994 – 95
Research Assistant, Professors Julie Collins and Doug Shackelford 1990 – 94
Analyst, PricewaterhouseCoopers Tax Policy Economics Group, Washington D.C. 1992 summer
M.B.A., University of Pittsburgh 1990
Senior Tax Accountant, Touche Ross (now, Deloitte), Pittsburgh PA 1987 – 89
Tax Accountant, Kavanagh and Milano P.C., Pittsburgh PA 1984 – 87
Certified Public Accountant (Pennsylvania) (inactive)
B.B.A., Accounting, University of Notre Dame 1984

TEACHING of Taxation courses

Taxes and Individual Financial Planning (BSBA-Finance) to be taught in spring of 2019
Tax Analysis (BSBA-Finance) 2018 – present
Taxes and Decision Making (BS-Accounting) 2018 – present
Federal Income Tax (BS Accounting) 2002 – 2017 (6.4 / 7 Rating since 2012)
Tax Seminar: Taxes and Investments (MACC) 2010 – 2018 (6.6 / 7 Rating since 2012)
Adv. Federal Income Tax on Businesses (MACC) 2005-11, 2015-17 (6.8 / 7 Rating since 2015)
Taxes & Business Strategy (MBA). Synchronous sessions - 10 nights per term. 2014 – 2018.
University of North Carolina-Chapel Hill Online MBA program
Advanced Tax Topics: Taxes and Investments (MACC) (½ of 3 credit course) 2007 – 2009
Taxes and Manager's Decisions (MBA) 2003 – 2006
Taxes and Decision Making (Indiana Univ.) 2002
Tax Analysis (at IU) 2002
Taxation of C Corps., S Corporations, & Shareholders (at Georgia St. U) (MTx) 1995 – 2001
Introduction to Federal Income Taxation (at GSU) 1995 – 2001

TEACHING RELATED AWARDS and GRANTS

Chancellor's Award for Excellence in Teaching (awarded to one UMSL professor per year) 2017
UMSL Summer Research and Teaching Grants Program 2008, 2013, 2017
Governor's Excellence in Teaching Award (awarded to one UMSL professor per year) 2006
American Taxation Association / Deloitte & Touche Teaching Innovation Award for "M. Tx.
Writing Web Site" (one of seven coauthors) 2004

UMSL Recipient of Certificate of Exemplary [Blackboard] Integration (i.e., course website) 2002
GSU Biannual Accounting Junior Faculty Outstanding Teacher Award 2000
GSU Center for Teaching and Learning Instructional Improvement Grants 1999, 2000

OTHER TEACHING RELATED ACTIVITIES

Require TopHat app (i.e., student response system) for all courses (2018 – present)
Require iClickers (i.e., student response device) for all courses (2008 - 2018)
Coauthor of a web site (“M. Tx. Writing Web Site,” at www.gsu.edu/~accerl) that develops written communication skills of students through lessons, examples, & self-tests 2004
University of Missouri system “New Faculty Teaching Scholars” program 2003 – 04

ADVISING of Students

Faculty Sponsor of “Accounting Internship (in taxation) for Academic Credit” (Acctng 3490 and 5490): 62 students since 2005
Faculty Sponsor of “Accounting Independent Research” (Acctng 5499) for student leaders of Volunteer Income Tax Assistance (VITA) program: 7 students since 2014

RESEARCH AWARDS

Montgomery-Warschauer Award for 2017: Honors the paper published in the Journal of Financial Planning in the prior year that provided the most outstanding contribution to the betterment of the profession.* - (see article below)

<https://www.onefpa.org/about/Press-Room/Pages/UMSL-Professor-to-Receive-2017-Montgomery-Warschauer-Award.aspx>

RESEARCH IN PROGRESS

“Qualified Charitable Distributions versus Charitable Donations of Appreciated Securities”
“Planning Around the QBI Deduction Phaseout for Specified Service Businesses”

PUBLISHED RESEARCH (see articles from last 12 years at <http://www.umsl.edu/~geisler/>)

“The Effect of Social Security Benefits and Required Minimum Distributions on Tax-Efficient Withdrawal Strategies,” with David Hulse, *Journal of Financial Planning*, February, 2018: 36-47.

“Taxable Social Security Benefits and High Marginal Tax Rates,”
Journal of Financial Service Professionals, September, 2017: 55-67.

“Investing in Stocks inside Retirement Accounts and Bonds in Taxable Accounts,”
Journal of Financial Service Professionals, September, 2017: 77-89.

- “The Taxation of Social Security Benefits and Planning Implications,” with David Hulse, *Journal of Financial Planning*, May, 2016: 52-63
- * - “Could a Health Savings Account Be Better than an Employer-Matched 401(k)?” *Journal of Financial Planning*, January, 2016: 40-48
- “529 Plan Distributions and Federal Tax Credits,” with Rebecca Bischoff, *Journal of Financial Service Professionals*, November, 2015: 64-69.
- “Understand the Key Differences in MO, IL, and KS When Advising Clients on 529 Plans,” with Stephen Moehrle, *The Asset*, January, 2015: 24-25
- “Traditional versus Roth 401(k) Contributions: The Effect of Employer Matches,” with David Hulse, *Journal of Financial Planning*, October 2014: 54-60
- “Retirement Account Options When Beginning a Career,” with Jerrold Stern, *Journal of Financial Service Professionals*, May 2014: 45-50
- “Federal Income Tax Laws That Cause Individuals’ Marginal and Statutory Tax Rates to Differ,” *Journal of Accounting Education*, 2013, Vol. 31, Issue 4: 430-460
- “The Effect of State Taxes on Baseball Free Agents,” w/ Stephen Moehrle, *State Tax Notes*, March 18, 2013: 869-878
- “Missouri Tax Savings Are the MOST,” with Stephen Moehrle, *The Asset*, November, 2011: 18-20
- “Taking Stock of Employee Stock Purchase Plans,” with Tim Farmer, *Journal of Accountancy*, May, 2007: 44-48.
- “MOST (Missouri’s 529 college savings plan) is a Must”, *The Asset*, March, 2007: 7
- “Comments on Stock Option Exercise Date Manipulation,” *Tax Notes*, January 15, 2007: 215–216
- “Best Use of Spare Cash,” *Journal of Accountancy*, September, 2006: 41-43.
- “An AMT Trap That Caught Teresa Heinz Kerry in 2003,” *Tax Notes*, July 18, 2005: 317–318.
- “The Use of Compensation for Tax Avoidance by Owners of Privately-Held Corporations,” with Sally Wallace, *Journal of American Taxation Association*, Spring 2005, Volume 27, Number 1:73–90

“Current Year Tax Laws that Cause Low Visibility of an Individual’s Effective Marginal Tax Rate,” with Ernie Larkins, *Tax Notes, November 3, 2003: 627–634.*

“Retirement Savings Credit: Investing \$1,500 at a Cost of \$284,” with Kelley Wingbermuehle, *Tax Notes, July 7, 2003: 69–71.*

“Marginal Tax Rates on Foreign Profits of U.S. Multinationals,” with Ernie Larkins, *Advances in Taxation, 2002, Vol. 14: 85–116.*

“Equity Security Investments: Evidence on Tax-Induced Dividend Clienteles,” *Journal of American Taxation Association, Spring 2000, Volume 22, Number 1:1–17.*

“Implementing Teaching Portfolios and Peer Reviews of Tax Courses,” with Michael Calegari and Ernest Larkins, *Journal of American Taxation Association (Educator’s Forum), Fall 1999, Volume 21, Number 2: 95–107.*

“The Effects of Taxes, Regulation, Earnings, and Organizational Form on Life Insurers’ Investment Portfolio Realizations,” with Julie Collins and Douglas Shackelford, *Journal of Accounting and Economics 1997, Volume 24, Number 3: 337–361.*

“Selling a Principal Residence After TRA ‘97,” with Nell Adkins and Steven Thompson, *The Tax Adviser, February 1998: 116–121.*

“The Disparate Treatment of Mobile and Long-Term Homeowners Under the New Home Sale Rules,” with Michael Calegari, *Real Estate Tax Digest, May 1998, Vol 16, #5: 161–167.*

PRESENTATIONS

The following were based on a competitive application process:

American Accounting Association annual meeting 2011, 2013, 2014, 2016, 2017

American Taxation Association Mid-Year Meeting 1998, 2014

Focus on Teaching & Technology - A Regional Conference (UMSL), 2008, 2010, 2013

American Accounting Assoc. annual meeting: Effective Learning Strategies 2006, ‘07, ‘09, ‘11

Midwest Regional Meeting-American Accounting Association, 2003, 2007

American Accounting Association annual meeting: Research Forum 1997, 2001, 2002

Southeast Summer Accounting Research Conference 1995, 1997, 2000

The following were invited:

Greater Indiana Financial Planning Association (for Certified Financial Planners)	2019
Greater Kansas City Financial Planning Association (for Certified Financial Planners)	2019
Greater Indiana Financial Planning Association (for Certified Financial Planners)	2018
UMSL Pierre Laclede Donor's Society: Tax-Advantaged Charitable Contributions	2018
Financial Planning Association annual conference (for Certified Financial Planners)	2017
UMSL Focus on Teaching and Technology Conference panel on award winning teachers	2017
Greater St. Louis Financial Planning Association (for Certified Financial Planners)	2017
UMSL College of Business faculty 'Teach It Forward'	2015
UMSL Beta Alpha Psi	2008, 2011, 2017
UMSL Accounting Club	2010
UMSL Staff Association	2008
UMSL CoBA's 'Breakfast and Business'	2006, 2007, 2009
UMSL 'Peer Evaluation of Group Writing Projects (with 3 or more group members)	2007
St. Louis chapter of Institute of Management Accountants	2007
UMSL 'Engaging Learners with Clickers in the Classroom'	2006
Southeastern Regional Meeting-American Accounting Association (Discussant)	1999
Southeastern Regional Meeting-Doctoral Consortium	1998
Center for Economic Policy Research/Stanford University	
• Annual Workshop on Life Insurance Taxation	1993

SERVICE

UMSL:

Chair of UMSL Budget and Planning Committee 2017 - 2018

Member of UMSL Budget and Planning Committee 2014 - 2017

Chair of UMSL Accounting Department's Scholarships Committee 2012 - now

Coordinator: UMSL Accounting Dept's "Accounting Internship for Academic Credit" 2007-now

Updated UMSL Accounting Dept.'s website in 2015:

www.umsl.edu/divisions/business/accounting/

University of Missouri System Research Board: Peer review of paper submitted for funding 2015

Organizer: Accounting Professional Skills workshop (1st through 5th annual) 2010 - 2014

- Prepare students for job interviews

Member of UMSL Accounting Advisory Board 2009-present

Chair of Accounting Department's "Faculty Recruiting Committee" 2011-12

Wrote UMSL Accounting Program brochure 2011, updated in 2015

Member of Ad Personam Committee for Review of Natalia Mintchik's Promotion & Tenure 2011

Train/teach all students in Volunteer Income Tax Assistance (VITA) program 2010 - 16

Member of UMSL AACSB Accounting Accreditation maintenance committee 2005-06, 2010-11

Chair of Ad Personam Committee for Review of Pamela Stuerke's Promotion and Tenure 2008

Member of UMSL Accounting Area Scholarships Committee 2004 - 2011

Coordinator: Steve Moehrle's nomination for UMSL Chancellor's teaching excellence award '07

Chair of UMSL College of Business Admin. (CBA) Undergrad Studies Committee 2006 – 07

- Developing revised UMSL CBA Graduation and Retention Requirements 2007
- Developed UMSL CBA Admission Requirements. Approved by full CBA faculty 2006

Chair of UMSL CBA Post-Tenure Review Ad Hoc Committee 2005 – 06

- Developed UMSL CBA Post-Tenure Standards. Approved by tenured CBA faculty '06

Member of UMSL CBA Faculty Research and Development Committee 2007 – 08

Member of UMSL Accounting Area Faculty Recruiting Committee 2004 – 06, 2008, 2013

Member of UMSL CBA ad personam committee- Dr. Jennifer Reynolds-Moehrle's T&P application

Member of UMSL CBA Undergraduate Studies Committee 2003 – 06

GSU:

Member of GSU Accounting Faculty Recruiting Committee 2001

Member of GSU Master of Taxation Program Assessment Committee 1997 – 2000

Member of two dissertation committees at GSU

Reviewer:

- Member of Issues in Accounting Education Editorial Board 2010 – 2012
- Member of Journal of American Taxation Association Editorial Board 2002 – 04, 2009 – 11
- Ad Hoc Reviewer for Accounting and Business Research 2013/2016
- Ad Hoc Reviewer for Journal of American Taxation Association 2002, 2006, 2008
- Ad Hoc Reviewer for Contemporary Accounting Research 2004
- External Reviewer of Research, Prof. Lynn Jones of Univ. of N. Florida (for tenure) 2008

Missouri Society of CPAs:

- Member of Wealth Management Committee and two of its four subcommittees 2016-now

American Taxation Association:

- Chair of Deloitte Tax Teaching Innovation Award Committee 2018
- Member of Deloitte Tax Teaching Innovation Award Committee 2009-2011, 2013-2015, 2017
- Chair of PricewaterhouseCoopers (PWC) Dissertation Award Committee 2007
- Member of PWC Dissertation Award Committee 1996, '97, 2000, '02, '05, '06, '08, '12
- Member of Tax Manuscript Award Committee 1998, 1999, 2001, 2003, 2004, 2006

QUOTES:

- Featured guest on podcast: <http://apexbg.libsyn.com/> to be posted 3rd week of Jan. 2019
- Featured guest on podcast: <http://apexbg.libsyn.com/41-hsa-the-best-use-of-spare-cash-in-2018>
- Quoted in *Money* magazine article on p.40 of March, 2018 issue in article titled “Make This One Change to Your Retirement Account Now, Tax Experts Say”, and online on January 12, 2018 <http://time.com/money/5097654/make-this-one-change-to-your-retirement-account-now-tax-experts-say/?iid=sr-link1>
- Quoted in *Money* magazine article on pp. 25 & 27 of December, 2017 issue in article titled

- “Are You Putting Too Much in Your 401(k)?”, and online on September 28, 2017
<http://time.com/money/4956393/are-you-putting-too-much-in-your-401k/?iid=sr-link2>
- Quoted in *Money* online on November 3, 2017
<http://time.com/money/5009453/an-important-tax-deduction-for-seniors-and-their-families-is-on-the-chopping-block/>
 - Quoted in *Money* magazine article on p. 38 of April, 2017 issue in article titled “Retire Early? Yes, You Can” <http://time.com/money/4697410/early-retirement-tips/>
 - Quoted in *Consumer Reports* online magazine article on February 24, 2017 in article titled “How Health Savings Accounts Work”
<http://www.consumerreports.org/health-savings-accounts/how-health-savings-accounts-work/>
 - Quoted in *Money* magazine article on p. 27 of September, 2016 issue in article titled “5 Things to Know About HSAs Now”
<http://time.com/money/4450518/health-savings-accounts-what-know/>
 - Quoted in CNBC.com article 6/15/16
www.cnbc.com/2016/06/15/health-savings-accounts-a-second-retirement-plan.html
 - Quoted in Weekend Investor section of *Wall Street Journal* 1/23/16
 - Appeared on KMOV Channel 4’s 6 pm news discussing Monsanto’s proposed merger 6/9/15
 - Quoted on front page of first section in *St. Louis Post-Dispatch* 6/23/14
 - Featured in UMSL Daily: <http://blogs.umsl.edu/news/2014/04/23/first-job/>
 - Quoted in Business section of *USAToday.com* 2014
 - Quoted in Business section of *St. Louis Post-Dispatch* 2005, ’06, ’09, 2/7/16, 4/19/16, 6/14/16
 - Quoted in Personal Finance column of Business section in *St. Louis Post-Dispatch* 2008

AWARDS

Montgomery-Warschauer Award (donated to charity) 2017
 Phi Kappa Phi (Honor Society) (inducted in) 2017
 UMSL Summer Research Awards 2004, 2014, 2017
 GSU Research Program Course Releases (for working papers) 1997, 2000
 Ernst & Young Doctoral Dissertation Fellowship 1993 – 94
 Coopers & Lybrand (now PWC) Scholar (Fellowship) 1990 – 92
 Associates Fellowship (University of Pittsburgh) 1989 – 90

PARTICIPANT (by invitation):

University of Illinois (biannual) Tax Symposium 2001, 2003
 University of North Carolina Tax Symposium 1997 – 2004, 2009, 2016

COMMUNITY RELATED SERVICE

Volunteer Income Tax Assistance tax return preparer/reviewer: Ferguson, MO 2016 - 2018
 CYC/West County Basketball Treasurer (over 240 teams) 2010 – 2012; 2015 – 2016