Greg Geisler, PhD (up to date through Apr. 12, 2024)

Indiana University - Bloomington, Kelley School of Business, Hodge Hall #5107,
1309 E. 10th Street, Bloomington IN 47405, 812-855-3834 geisler@iu.edu

Academic and Professional Experience

Associate Chairperson, Department of Accounting Fall 2021–present
Clinical Professor, Indiana University 2018–present
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 2001–2002
Assistant Professor, Georgia State University (GSU) 1995–2001
Lecturer, University of North Carolina at Chapel Hill 1994– 1995
Senior Tax Accountant, Touche Ross (now, Deloitte), Pittsburgh PA 1987–1989
Tax Accountant, Kavanagh and Milano P.C., Pittsburgh PA 1984–1987

Education and Certification

Ph.D., Accounting, University of North Carolina at Chapel Hill 1995
M.B.A., University of Pittsburgh 1990
Certified Public Accountant (Pennsylvania) 1984 (inactive)
B.B.A., Accounting, University of Notre Dame 1984

CURRENT FACULTY POSITION AT INDIANA UNIVERSITY: 2018 - PRESENT

TEACHING

Taxation Courses Taught

A333/355 Taxes & Individual Financial Planning (BSBA-Finance); 6 sections (2019–2024)
A329 Taxes and Decision Making (BS-Accounting) 17 sections (2018–2024)
A327 Tax Analysis (BSBA-Finance); 23 sections (2018–spring 2022)

Teaching Award Nominations

Nominated for American Accounting Association's Cook/Deloitte Undergraduate Superior Teacher prize 2019, 2020

Other Teaching Activities

Taught every course at IU-B face-to-face (except summer), even during the COVID-19 pandemic
Require TopHat app (i.e., student response via cellphone) for all courses (2018–present) for every classroom presentation

Media Citations

• Featured on 6 pm Indianapolis, IN WRTV-TV channel 4 (ABC) newscast on January 30, 2024 https://www.wrtv.com/news/local-news/irs-begins-2024-tax-filing-season

• Quoted online at Barrons.com https://www.barrons.com/articles/tax-extension-deadline-estimate-what-you-owe-6b81a7f3?refsec=financial-planning&mod=topics_financial-planning on April 7, 2023

• Quoted online at wallethub.com https://wallethub.com/edu/states-with-the-highest-and-lowest-property-taxes/11585#expert=Greg_Geisler on February 21, 2023

• Quoted online at Barrons.com https://www.barrons.com/articles/taxes-k-1-partnerships-k-3-4757e645 on February 11, 2023

• Featured on 6 pm Terre Haute, IN WTHI-TV newscast on January 29, 2023 https://www.wthitv.com/news/consumer/tips-for-tax-season/article_3a763638-a047-11ed-87e5-7f660ea4a174.html

• Quoted in article published on Indiana Public Media's website on January 30, 2023 https://indianapublicmedia.org/news/2023-tax-refunds-will-be-lower-than-previous-years.php

• Quoted in article published in Barron's magazine on December 15, 2022 https://www.barrons.com/articles/medicare-premiums-taxes-irmaa-51671059739

• Featured on 6 pm Indianapolis, IN WRTV-TV newscast on October 13, 2022 https://www.youtube.com/watch?v=FAzGFFkcsDU

• Panelist on one hour discussion on Household Debt, Bloomington, IN WFIU 103.7 Radio on October 7, 2022 https://indianapublicmedia.org/noonedition/the-u.s.-household-debt-total-continues-to-increase.php

• Featured on 5 pm Terre Haute, IN WTHI-TV newscast on February 24, 2022 https://www.wthitv.com/video/free-and-local-tax-help/video_6aaa7a91-7ffb-5ae8-bad3-7e5e09609eee.html

• Featured on 5 pm Terre Haute, IN WTHI-TV newscast on January 24, 2022 https://www.wthitv.com/video/delayed-tax-refund/video_803a998a-d607-5db1-80aa-4ff8db7533bb.html

• Featured on 5pm Indianapolis WISH-TV (CW) newscast January 12, 2022: https://www.wishtv.com/news/i-team-8/irs-be-prepared-for-a-frustrating-tax-season/

• Featured on 5 pm Miami, FL WFOR-TV (CBS) newscast Dec. 27, 2021 https://miami.cbslocal.com/2021/12/27/maximize-your-wallet-prepare-tax-season/

• Quoted in article published on nerdwallet.com https://www.nerdwallet.com/article/investing/backdoor-roth-alternatives Nov. 4, 2021

• Quoted in article published on marketwatch.com https://www.marketwatch.com/story/smart-withdrawals-can-reduce-taxes-extend-your-nest-egg-in-retirement-11630689724Sept. 5, 2021

• Featured on 6 pm Indianapolis WISH-TV (CW) newscast May 12, 2021: https://www.wishtv.com/news/i-team-8/what-to-know-about-unemployment-benefits-and-your-taxes/

• IU GAP program blog post: "Tax Law Helps MSADA Graduates Stay Healthy and Gain Financial Freedom" https://msa32blog.kelley.iu.edu/ April 20, 2021

• IU press release of publication featured on the following website and podcast, respectively: https://www.futurity.org/health-savings-accounts-early-career-finances-2542942-2/ https://research.impact.iu.edu/research-news/podcasts/index.html , April 7, 2021

• Featured on 10 pm Indianapolis WISH-TV (CW) newscast March 19, 2021:

https://www.wishtv.com/news/i-team-8/irs-pandemic-old-technology-understaffing-leave-millions-of-2019-tax-returns-untouched/
• Interviewed for online question and answer article at freelancersunion.org – February 16, 2021 https://blog.freelancersunion.org/2021/02/16/everything-you-need-to-know-about-filing-freelance-taxes-for-the-first-time/
• Quoted in St. Louis Post-Dispatch - June 12, 2020 Working from home instead of in the city? Don't expect a break from paying the St. Louis earnings tax.(paywall)
• Featured on 4:30 pm and 6:00 pm Indianapolis WXIN-TV (Fox 59) newscast on May 22, 2020: https://fox59.com/news/people-across-indiana-still-waiting-on-stimulus-checks/
• Quoted on NPR radio, "Marketplace" part of the news, May 12, 2020: https://www.marketplace.org/2020/05/12/covid-19-stimulus-check-irs-direct-deposit/
• Featured on 5:30 pm Indianapolis WTHR-TV (NBC) newscast April 23, 2020: https://www.wthr.com/article/wheres-federal-stimulus-dollars-answer-complicated
• Featured on 10 pm Indianapolis WISH-TV (CW) newscast April 14, 2020: https://www.wishtv.com/news/local-news/4-answers-to-common-questions-about-your-stimulus-check/.

Presentations

The following were based on a competitive application process:

Financial Planning Association annual conference (for Certif. Fin'l Planners) (CPE) Sept. 28, 2023
Financial Planning Association annual conference (for Certified Financial Planners) Sept. 2019
American Accounting Association annual meeting: Research Forum Aug. 2019

The following were invited:

Greater Indiana Financial Planning Assoc. (for Certified Financial Planners)
On Student Loans Impact on an Individual's Financial Future May 10, 2024
Journal (of Financial Service Professionals) Live: Audio Webinar on Excessive
Student Loan Debt (for Financial Advisers) Apr. 25, 2024
American Association of Individual Investors – Puget Sound chapter
"Tax-Efficient Accumulation" Mar. 20, 2024
"Tax-Efficient Decumulation during Retirement" Sept. 20, 2023
Colorado Financial Planning Assoc. (for Certified Financial Planners)
Maximizing Tax Alpha in Accumulation phase for working clients, in
Decumulation phase for retired clients, and for Charitable Giving (CPE) Jan. 25, 2024
Acctng. Dept. Lunch and Learn on "Tax-Efficient Accumulation, Benefits, & Estate planning"
Oct. 20, 2023
Greater Indiana Financial Planning Assoc. (for Certified Financial Planners)
on Tax-efficient Decumulation During Retirement Years (CPE) May 19, 2023
IU Students: Shoemaker Innovation Center's Shoebox Incubation program (Luddy Hall) Which
Organization Form to Choose; Tax Return filing requirements 4/8/22, 2/10/23, 2/9/24
Retirement-Resource-Center.com webinar on Avoiding/reducing additional Medicare

premiums and the Social Security Benefits Tax Torpedo Dec. 15, 2022
Financial Planning Association annual conference (for Certified Financial Planners)
on "A Comparison of the Tax Efficiency of Decumulation Strategies." (CPE) Dec. 12, 2022
Accounting Department Lunch and Learn on "Tax-Efficient Accumulation" Nov. 11, 2022
Financialexperts.com webinar on Avoiding/Reducing "IRMAA Tax" Nov. 1, 2022
Greater Pittsburgh Financial Planning Assoc. (for Certified Financial Planners)
on Tax-Efficient Decumulation after Retiring (CPE) Oct. 27, 2022
Hurlow Wealth Management webinar on Golden Years for Tax Planning June 22, 2022
Financialexperts.com webinar on Social Security Tax Torpedo June 21, 2022
Financialexperts.com webinar on Rank order of investing & paying down debts June 14, 2022
Greater Indiana Financial Planning Assoc. (for Certified Financial Planners)
on How to Avoid Additional Medicare Premiums (CPE) May 13, 2022
IU Students: Kelley's Business Operations Consulting Workshop
on Financial Freedom by Using the Tax Laws April 13, 2022
Financial Planning Association Fall Learning Series; (recorded) available Nov. 8, 2021
Society of Financial Service Professionals (for financial advisors); webinar Aug. 12, 2021
Society of Financial Service Professionals (for financial advisors); conference call May 20, 2021
Greater Indiana Financial Planning Assoc. (for Certified Financial Planners) Sept. 18, 2020
Greater Pittsburgh Financial Planning Assoc. (for Certified Financial Planners) July 9, 2020
Greater Indiana Financial Planning Assoc. (for Certified Financial Planners) Sept. 20, 2019
Teaching Food for Thought: "Using Top Hat in the Classroom" co-presenter Apr. 26, 2019
IU Student Financial Planning Assoc. Feb. 19, 2019, Oct. 6, 2020
Greater Kansas City Financial Planning Assoc. (for Certified Financial Planners) Jan. 16, 2019
Greater Indiana Financial Planning Association (for Certified Financial Planners) Nov. 16, 2018

SERVICE

Kelley School of Business

Associate Chairperson of Department of Accounting Fall 2021–Summer 2025
Graduate Accounting Program Policy Committee 2023–24
Chair of Accounting Department Nontenure track recruiting committee 2022–24
Faculty Advisor for Virtual Income Tax Assistance for international students 2020–24
Member of Accounting Department Media Group committee 2023–24
Undergraduate Accounting Course Coordinator for A329 and A327 2022–24
Assist Chris Cook, Leader of Assurance of Learning in Accounting Dept. 2022–24
Assist Gina Rogers with Accounting Graduate Assistants 2022–24
Member of Nontenure-track Accounting faculty Annual Review Committee 2022–24
Mentor of new accounting faculty: Will Demere and Brett Levitt 2023–24
Mentor of new accounting faculty: Mike Healy and Brett Whitaker 2022–23
Co-leader, along with Sonja Rego, of New Accounting Faculty Orientation 2022, '23
Member of Accounting Department Online M.S.Accounting Committee 2022

Member of KSB committee to redesign the undergraduate prerequisite math course requirements 2021–22
Member of Accounting Department Undergraduate Curriculum Committee 2021–24
Member of Accounting Dept. Staff recruiting committee 2021–22
Member of Accounting Department Nontenure track recruiting committee 2020–22
Member of Kelley School of Business Finance Graduate Programs Committee 2018–24
Faculty Advisor for VITA (sponsored by Beta Alpha Psi) 2019–20
Recruited the undergraduate team that won Deloitte FanTAXtic National Competition 2018

Community Service

Faculty Coordinator of Virtual Income Tax Assistance to assist international students in properly completing federal & state Nonresident income tax returns Jan.–Apr. 2021, '22, '23, '24
Volunteer Income Tax Assistance tax return preparer/reviewer: Bloomington, IN (Hodge Hall and Maurer School of Law) 2020

National Service

• External Reviewer for Promotion to Assoc. Prof. of Practice (from Asst. Prof. of Practice), Kay Maresh, U. of Nebraska-Lincoln 2023
• Editorial Board of Financial Planning Review 2023–24
American Taxation Association:
• Member of Deloitte Tax Teaching Innovation Award Committee 2019, 2020, 2021
Reviewer:
• Ad Hoc Reviewer for Financial Services Review 2019
• Ad Hoc Reviewer for Journal of Accounting, Auditing and Finance 2018–19

PRACTITIONER RESEARCH

In Progress

Working Paper

Forthcoming

Publications

Geisler, Greg, and Bill Harden. 2024. "Excessive Student Loans: The Harbinger of Death to Your Financial Future" *Journal of Financial Service Professionals,* 78 (2): 60-70.

Geisler, Greg, and Bill Harden. 2023. "Maximizing Tax Alpha in both Accumulating and Decumulating Retirement Savings" *Journal of Financial Service Professionals* 77 (2): 46-58.

Greg Geisler. 2021. "How to Avoid Paying Higher Medicare Premiums the First Two Years after Retiring." *Journal of Financial Planning* 34 (9): 66-77.

Geisler, Greg, Bill Harden, and David S. Hulse. 2021. "A Comparison of the Tax Efficiency of Decumulation Strategies." *Journal of Financial Planning* 34 (3): 72-89.*
Reprinted in *Journal of Financial Planning*, 34 (The Best of 2021): 54-71.
*2022 Montgomery-Warschauer Award for most outstanding contribution to the betterment of the financial planning profession (of all articles published in 2021 monthly issues of *Journal of Financial Planning*)

Greg Geisler. 2021. "On the Way to Financial Freedom when Beginning a Career." *Journal of Financial Service Professionals* 75 (2): 58-69.

Geisler, Greg, and Michele Meckfessel. 2021. "Pandemic-Related IRS Shutdown Affects Tax-Exempt Organizations." *Tax Notes Federal* 170 (11): 1705-1708.

Geisler, Greg, and Bill Harden. 2019. "Should Charitable Taxpayers Donate Directly from an IRA or Donate Appreciated Securities?" *Journal of Financial Planning* 32 (12): 46-56.

Geisler, Greg, and Dawn Drnevich. 2019. "Tax Planning around the Phase-Out of the Qualified Business Income Deduction for Professional Service Businesses." *Journal of Financial Planning* 32 (6): 50-56.

Drnevich, Dawn, and Greg Geisler. 2019. "The Marriage Tax Penalty: Implications for High-Income Taxpayers." *Tax Notes Federal* 168 (16): 557-564.

AWARDS

Montgomery-Warschauer Award: 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. 2022

PRIOR TO CURRENT FACULTY POSITION AT INDIANA UNIVERSITY

TEACHING

Taxation Courses Taught

Federal Income Tax (B.S. Accounting) 2002–2017 (UMSL)
Tax Seminar: Taxes and Investments (M.Acc.) 2010–2018 (UMSL)
Advanced Federal Income Tax: Businesses (M.Acc.) 2005–2011, 2015–2017 (UMSL)
Taxes & Business Strategy (online MBA) 2014–2018 (Univ. of North Carolina-Chapel Hill)
Advanced Tax Topics: Taxes and Investments (M.Acc.) 2007–2009 (UMSL)
Taxes and Manager's Decisions (MBA) 2003–2006 (UMSL)
Taxes and Decision Making (B.S. Accounting) 2002 (Indiana Univ.)
Tax Analysis (B.S. Accounting) 2002 (Indiana Univ.)
Taxation of C Corps., S Corps., & Shareholders (M.Tx) 1995–2001 (Georgia St. U.)
Introduction to Federal Income Taxation (BSA) 1995–2001 (Georgia St. U.)

Teaching 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 Activities

Require iClickers (i.e., student response device) for all courses (2008–2018 at UMSL)
University of Missouri system "New Faculty Teaching Scholars" program 2003–04
UMSL: Faculty Sponsor of "Accounting Internship (in taxation) for Academic Credit" (Acctng 3490 and 5490): 62 students from 2005–2018
UMSL: Faculty Sponsor of "Accounting Independent Research" (Acctng 5499) for student leaders of Volunteer Income Tax Assistance (VITA) program: 7 students 2014–2018

Media Citations

• Featured guest on podcast: https://apexbg.com/53-the-hsa-shoebox-theory-strategy-for-long-term-financial-planning/
• 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 June 15, 2016 www.cnbc.com/2016/06/15/health-savings-accounts-a-second-retirement-plan.html
- Quoted in Weekend Investor section of *Wall Street Journal* January 23, 2016
- Appeared on St. Louis KMOV-TV Channel 4's 6 pm news discussing Monsanto's proposed merger June 9, 2015
- Quoted on front page of first section in *St. Louis Post-Dispatch* June 23, 2014
- 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, 2006, 2009, February 7, 2016, April 19, 2016, June 14, 2016
- Quoted in Personal Finance column of Business section in *St. Louis Post-Dispatch* 2008

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:

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)	Feb. 2, 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 College of Business'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

University of Missouri, St. Louis

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 2012–2018
Coordinator: UMSL Accounting Dept's "Accounting Internship for Academic Credit" 2007–18
Updated UMSL Accounting Dept.'s website in 2015
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 2009–2018
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 comm. 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 2006

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 2005

Member of UMSL CBA Undergraduate Studies Committee 2003–06

Georgia State University

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

- AAA annual meeting reviewer of two ATA papers 2017, 2018, 2019
- 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

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, 2019, 2020, 2021
- 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

Invited Conferences

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

Community Service

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

RESEARCH

Practitioner Research

"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.
**2017 Montgomery-Warschauer Award for most outstanding contribution to the betterment of the financial planning profession (of all articles published in 2016 monthly issues of *Journal of Financial Planning*)

"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, No. 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.

"MO$T (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.

"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.

"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, No.5: 161–167.

Academic Research

"The Use of Compensation for Tax Avoidance by Owners of Privately-Held Corporations," with Sally Wallace, *Journal of American Taxation Association*, Spring 2005, Vol. 27, No. 1: 73–90.

"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, Vol. 22, No. 1: 1–17.

"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, Vol. 24, No. 3: 337–361.

Academic Teaching Pedagogy Research

"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, Vol. 21, No. 2: 95–107.

Awards

Montgomery-Warschauer Award: 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. 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