

Professional Profile for Dr. Daniel Taylor:

Daniel Taylor is the Arthur Andersen Chaired Professor at The Wharton School, and director of the [Wharton Forensic Analytics Lab](#). He is an award-winning researcher and teacher with extensive expertise on corporate disclosures, insider trading, and fraud prediction. He has published extensively on these topics in leading academic journals; led seminars at dozens of top business schools across the globe; and won numerous academic and industry awards.

Prof. Taylor seeks to conduct research that can drive meaningful changes to society, its laws, and enforcement of those laws. His research frequently appears in the business media and has been cited in rules and regulations promulgated by the SEC. His research on the trading of corporate insiders and associated disclosures was the driver behind the SEC's decision to mandate electronic reporting of Form 144 filings; the SEC's decision to amend Rule 10B5-1 and associated trading plans; and the introduction of the Holding Foreign Insiders Accountable Act in the US Senate.

His research is relevant to a variety of practitioners and regulators seeking to understand, detect, and deter white-collar crime. He has provided consulting services related to best practices in corporate disclosure, 10B5-1 trading plans, statistical analysis of stock prices and trading activity, and fraud prediction. In addition, he has co-developed and licensed intellectual property related to parsing SEC filings. His consulting clients include the DoJ, hedge funds, plaintiff and defense firms, and a Big 4 auditor.

Professor Taylor teaches a cutting-edge undergraduate course—Forensic Analytics—that applies state-of-the-art analytic tools to corporate disclosures, and teaches undergraduate and doctoral seminars on data analysis. His doctoral students have gone on to become faculty at a variety of leading business schools, including Stanford, MIT, and Chicago. He received his bachelor's degree from University of Delaware, his master's from Duke University, and his PhD from Stanford University.

Daniel J. Taylor

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The Wharton School
University of Pennsylvania

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EDUCATION

Stanford University
Ph.D. Business, 2010

Duke University
M.A. Economics, 2005

University of Delaware
B.S. Economics, 2003
Minor: Information Systems; Cum Laude

ACADEMIC POSITIONS

The Wharton School of the University of Pennsylvania

<i>Professor</i>	2022 – present
Arthur Andersen Chair, 2020 – present	
Founder & Director, Wharton Forensic Analytics Lab , 2021 – present	
Wharton Teaching Excellence Award, 2019, 2020, 2021	
Analytics @Wharton Teaching Grant, 2020, 2021	
Analytics @Wharton Fellow, 2020 – present	
Wharton Faculty Fellow, 2019	
<i>Associate Professor</i>	2017 – 2022
<i>Assistant Professor</i>	2011 – 2017
<i>Lecturer</i>	2010 – 2011

RESEARCH INTERESTS

insider trading, financial misreporting, corporate disclosure, methodology

ACADEMIC PUBLICATIONS

INSIDER TRADING

Holding Foreign Insiders Accountable

(with R. Jackson and B. Lynch) working paper

Press: *Financial Times* (Nov 2021); *Wall Street Journal* (Apr 2022); *Bloomberg Money Stuff* (Apr 2022); *Harvard Law School Forum on Corporate Governance* (Jun 2022)

Policy: co-authored companion [policy brief](#); Congressional testimony before the Senate Banking Committee (Apr 2022); Sen. Kennedy introduced the “Holding Foreign Insiders Accountable Act” in May 2022.

Dark Side of Investor Conferences: Evidence of Managerial Opportunism

(with B. Bushee and C. Zhu) The Accounting Review, forthcoming

Press: *Columbia Law School Blue Sky Blog* (Jan 2021); *Bloomberg Money Stuff* (Jan 2021)

Audit Process, Private Information, and Insider Trading

(with S. Arif, J. Kepler, and J. Schroeder) Review of Accounting Studies, September 2022

Press: *Harvard Law School Forum on Corporate Governance* (Nov 2018); *Marketwatch* (Mar 2019); *Marketwatch* (Jun 2019)

Prize: *Best Academic Paper Award*, Weinberg Corporate Governance Symposium (2019)

Undisclosed SEC Investigations

(with T. Blackburne, J. Kepler, and P. Quinn) Management Science, June 2021

Press: *Columbia Law School Blue Sky Blog* (Feb 2020); *Bloomberg Money Stuff* (Feb 2020), *Securities Regulation Daily* (Feb 2020); *Corporate Counsel* (Mar 2020); *Wall Street Journal* (Sep 2021)

Prize: *Outstanding Research Paper Award*, Jacobs Levy Center for Quantitative Financial Research (2020)

Policy: Cited in the SEC’s final ruling on exemptions to 404(b) of SOX “Amendments to the Accelerated Filer and Large Accelerated Filer Definitions” *SEC Release No. 34-88365*

Gaming the System: Three Red Flags of Potential 10B5-1 Abuse

(with D. Larcker, B. Lynch, P. Quinn, and B. Tayan) Stanford Closer Look Series, Jan 2021: 1-17. Stanford University Press.

Press: *Harvard Law School Forum on Corporate Governance* (Jan 2021); *Cooley PubCo* (Feb 2021); *Reuters* (Jun 2021, Dec 2021); *Bloomberg* (Jun 2021, Dec 2021); *Bloomberg*

Money Stuff (Jun 2021, Sep 2021); *Financial Times* (Jun 2021, Jul 2021, Dec 2021); *Law360* (Jun 2021 x4; Jul 2021); *Wall Street Journal* (Jun 2021, Aug 2021, Dec 2021 x2); *Forbes* (Aug 2021);

Policy: cited extensively in SEC’s Proposed Changes to Rule 10B5-1 “Rule 10B5-1 and Insider Trading” *SEC Release No. 34-93782*; presented to the SEC’s Investor Advisory Committee (Jun 2021); cited in speeches by Chair Gensler at WSJ-CFO Summit (Jun 2021) and SEC Commissioner Allison Herren Lee (Dec 2021); cited in comment letters to the SEC by the AFL-CIO (Apr 2022), Council of Institutional Investors (Apr 2022), and New York City Employee Retirement System (Apr 2022); cited in New York City Comptroller’s proxy challenge to Abbott Labs and McKesson on 10b5-1 plans, supported by ISS and GlassLewis with 49% of the vote;

Political Connections and the Informativeness of Insider Trades

(with A. Jagolinzer, D. Larcker, and G. Ormazabal) *Journal of Finance*, August 2020

Press: *Harvard Law School Forum on Corporate Governance* (Sep 2016); *The Economist* (Feb 2018); *CNBC* (Feb 2018); *Bloomberg Law* (Mar 2020); *Bloomberg Money Stuff* (Mar 2020), *DailyMail* (Mar 2020); *Fox Business* (Mar 2020); *Law.com* (Mar 2020); *Reuters* (Mar 2020, Apr 2020); *Securities Docket* (Mar 2020); *Yahoo Finance* (Mar 2020); *Yahoo News* (Mar 2020); *The Week* (Mar 2020); *US News and World Report* (Mar 2020, Apr 2020), *New York Times* (Apr 2020)

Prize: *Outstanding Research Paper Award*, Jacobs Levy Center for Quantitative Financial Research (2019). Almetrics media influence score in the top 5% of all academic research, ranked in top 0.5% within *Journal of Finance*.

Policy: Synopsis printed in *CATO Institute Research Briefs in Economic Policy* (Jan 2018)

Governance of Corporate Insiders’ Equity Trades

(with D. Larcker, J.Kepler, and B. Tayan) in *Stanford Closer Look Series*, Jan 2020: 1-5. Stanford University Press.

Press: *Harvard Law School Forum on Corporate Governance* (Jan 2020)

Corporate Governance and the Information Content of Insider Trades

(with A. Jagolinzer and D. Larcker) *Journal of Accounting Research*, Dec 2011

Press: *Harvard Law School Forum on Corporate Governance* (Oct 2011); *Marketwatch* (Mar 2019);

FINANCIAL MISREPORTING

[The Economics of Misreporting and the Role of Public Scrutiny](#)

(with D. Samuels and R. Verrecchia) Journal of Accounting and Economics, February 2021

Press: *CFO* (May 2018); *Barron's* (Jun 2018)

[Abnormal Accruals in Newly Public Companies: Misreporting or Economic Activity?](#)

(with C. Armstrong and G. Foster) Management Science, May 2016

[The Relation Between Equity Incentives and Misreporting: The Role of Risk-Taking Incentives](#)

(with C. Armstrong, D. Larcker, and G. Ormazabal) Journal of Financial Economics, Aug 2013

Press: *Wall Street Journal* (May 2013); *Harvard Law School Forum on Corporate Governance* (May 2013)

Policy: featured in keynote address by PCAOB Chair James Doty at the AICPA National Conference on Current SEC and PCAOB Developments (Dec 2012)

[Why Do Pro Forma and Street Earnings Not Reflect Changes in GAAP?](#)

(with M. Barth and I. Gow) Review of Accounting Studies, Sep 2012

Press: *Harvard Law School Forum on Corporate Governance* (Nov 2010); *Wall Street Journal* (May 2015)

[In Defense of Fair Value: Weighing the Evidence on Earnings Management and Securitizations](#)

(with M. Barth) Journal of Accounting and Economics, Feb 2010

DISCLOSURE AND STOCK PRICES

[The Information Content of Corporate Websites](#)

(with B. Lynch) working paper

Prize: 2021 NBER Big Data and Securities Markets Conference

[Disclosure Substitution](#)

(with M. Heinle and D. Samuels) Management Science, forthcoming

[Voluntary Disclosure when Private Information and Disclosure Costs are Jointly Determined](#)

(with J.M. Kim and R. Verrecchia) Review of Accounting Studies, June 2021

The Spread of Covid-19 Disclosures

(with D. Larcker, B. Lynch, and B. Tayan) in Stanford Closer Look Series, June 2020: 1-5. Stanford University Press.

Press: *Bloomberg Money Stuff* (Jun 2020); *Cooley PubCo* (June 2020); *Harvard Law School Forum on Corporate Governance* (Jul 2020); included in NIRI's *Covid-19 Crisis Response Library* (Jul 2020)

Policy: staff briefing to House Financial Services Committee (Jul 2020); presented to the SEC's Investor Advisory Committee (Dec 2020); presentation covered by *Law360* (Dec 2020)

Linguistic Complexity in Firm Disclosures: Obfuscation or Information

(with B. Bushee and I. Gow) Journal of Accounting Research, March 2018

Press: synopsis printed in *CFA Digest* (Dec 2018)

Prize: Top 5 most highly-cited papers published in the journal since 2018

Other: Perl command to calculate Fog Index, *Lingua:EN:Fathom*, was revised as a result of the computational errors identified in this paper (see v1.22 of command)

JOBS Act and Information Uncertainty in IPO Firms

(with M. Barth and W. Landsman) The Accounting Review, Nov 2017

Press: *Harvard Law School Forum on Corporate Governance* (Aug 2014); *CFO* (Oct 2017); *CPA Practice Advisor* (Oct 2017); *MarketWatch* (Oct 2017); *The Intercept* (Feb 2018); *Xconomy* (Apr 2019); *Accounting Today* (Aug 2020) *CPA Practice Advisor* (2020)

Prize: *Notable Contribution to Accounting Literature Award*, AICPA (2020), Almetrics media influence score in the top 25% of all academic research, ranked in top 10% within *The Accounting Review*.

Policy: cited in speeches by SEC Commissioner Kara Stein (Dec 2016, Jun 2018); cited in the SEC's final ruling on amendments to Regulation A of the Securities Act, "Amendments for Small and Additional Issues Exemptions Under the Securities Act" *SEC Release Nos. 33-9741, 34-74578, 39-2501*

Guiding Through the Fog: Financial Statement Complexity and Voluntary Disclosure

(with W. Guay and D. Samuels) Journal of Accounting and Economics, Nov 2016

Press: *Columbia Law School Blue Sky Blog* (Mar 2015)

Prize: Top 5 most highly-cited papers published in the journal since 2016

Delegated Trade and the Pricing of Public and Private Information

(with R. Verrecchia) Journal of Accounting and Economics, Dec 2015

[Follow the Money: Compensation, Risk, and the Financial Crisis](#)

(with D. Larcker, G. Ormazabal, and B. Tayan) in Stanford Closer Look Series, Sept 2014: 1-5. Stanford University Press.

[Asset Securitizations and Credit Risk](#)

(with M. Barth and G. Ormazabal) The Accounting Review, Mar 2012

[Frictions in the CEO Labor Market: The Role of Talent Agents in CEO Compensation](#)

(with S. Rajgopal and M. Venkatachalam) Contemporary Accounting Research, Spring 2012

[The Market Reaction to Corporate Governance Regulation](#)

(with D. Larcker and G. Ormazabal) Journal of Financial Economics, Aug 2011

Press: *Wall Street Journal* (Jul 2010); *New York Times* (Nov 2010); *Harvard Law School Forum on Corporate Governance* (Sep 2010); *CFA Institute* (Aug 2014); synopses printed in *CFA Digest* (Aug 2011)

Policy: cited in the SEC's final ruling on proxy access (SEC Rules 14a-8 and 14a-11) "Facilitating Shareholder Director Nominations" *SEC Release No. 33-9136*

[When Does Information Asymmetry Affect the Cost of Capital?](#)

(with C. Armstrong, J. Core, and R. Verrecchia) Journal of Accounting Research, Mar 2011

Policy: cited in the SEC's proposed rule regarding mandatory clawbacks "Listing Standards for Recovery of Erroneously Awarded Compensation" *SEC Release Nos. 33-9861, 34-75342*; cited in the SEC's proposed exemptions to Section 404(b) of SOX "Amendments to the Accelerated Filer and Large Accelerated Filer Definitions" *SEC Release No. 34-85814*

[Post-Earnings Announcement Drift and Related Anomalies](#)

in Handbook of Equity Market Anomalies (2011): 91-115. Wiley Publishing. Ed. Len Zacks.

[The Stock Market's Pricing of Customer Satisfaction](#)

(with C. Ittner and D. Larcker) Marketing Science, Oct 2009

METHODOLOGY

[Measurement Error, Fixed Effects, and False Positives in Accounting Research](#)

(with J. Jennings, J.M. Kim, and J. Lee) *Review of Accounting Studies*, forthcoming

Causality Redux: The Evolution of Empirical Methods in Accounting Research

(with C. Armstrong, J. Kepler, and D. Samuels) Journal of Accounting and Economics, forthcoming

Economics of Managerial Taxes and Corporate Risk-Taking

(with C. Armstrong, S. Glaeser, and S. Huang) The Accounting Review, January 2019

Press: Featured in *Columbia Law School Blue Sky Blog* (Dec 2017)

Thoughts on the Divide Between Theoretical and Empirical Research in Accounting

(with Q. Chen, J. Gerakos, and V. Glode) Journal of Financial Reporting, Fall 2016

From Casual to Causal Inference in Accounting Research: The Need for Theoretical Foundations

(with J. Bertomeu and A. Beyer) Foundations and Trends in Accounting, Fall 2016

Correcting for Cross-Sectional and Time-Series Dependence in Accounting Research

(with I. Gow and G. Ormazabal) The Accounting Review, Mar 2010

Prize: Top 5 most highly-cited paper published in the journal since 2010

OP-EDS, COURT BRIEFS, AND REGULATORY COMMENT LETTERS

Amicus Curiae in Support of Claims that Engineered Short Squeezes are a Form of Market Manipulation

(co-authored with 6 other academic co-authors) US Court of Appeals, Tenth Circuit, Case 21-4126, Feb 2022.

Amicus Curiae in Support of Claims that SPACs are Not Valued as Operating Companies

(lead co-author with 30 other academic co-authors) US District Court for the Southern District of New York, Case 1:21-cv-07072-JPO, Nov 2021.

Policy: Parties settled, over \$4 billion returned to investors, no lawyer fees, SEC revised rules covering SPACs

Amicus Curiae in Support of Claims that 10B5-1 Trading Plans Can Be Probative of Scienter

(lead co-author with Joshua Mitts, with 7 other academic co-authors) US Court of Appeals for the 10th Circuit, Case 21-4058, Sept 2021.

Policy: Appeals court concurred with the brief and ruled that the lower court erred in dismissing the possibility that 10B5-1 trades could be probative of scienter

[OpEd: Insider Trading Loopholes Need to be Closed](#)

(with SEC Commissioner Caroline Crenshaw) [Bloomberg](#), Mar 2021

[Comment Letter on the SEC’s Proposed Rule 144 Holding Period and Form 144 Filings](#)

(with David Larcker and Bradford Lynch), Mar 2021

Press: *Harvard Law School Forum on Corporate Governance* (Mar 2021)

Policy: cited in the SEC’s Final Rule “EDGAR Filing Requirements and Form 144 Filings” *SEC Release No. 33-11070*; cited in the SEC’s Proposed Rule Changes on Rule 10B5-1 “Rule 10B5-1 and Insider Trading” *SEC Release No. 34-93782*;

Other: The evidence and discussion offered in this comment letter is the reason why Form 144 exists on EDGAR, and is required to be filed electronically. The data analyzed in this comment letter is also featured in the papers [Holding Foreign Insiders Accountable](#) and [Gaming the System: Three Red Flags of Potential 10B5-1 Abuse](#)

[OpEd: How the SEC Can and Should Fix Insider Trading Rules](#)

(with A. Jagolinzer and D. Larcker) [The Hill](#), Dec 2020

Policy: policy recommendations adopted by Sens. Brown, Van Hollen, and Warren in their Feb 10, 2021 letter to the SEC; cited in the SEC’s Proposed Rule Changes on Rule 10B5-1 “Rule 10B5-1 and Insider Trading” *SEC Release No. 34-93782*

[Comment Letter on the SEC’s Proposed Reporting Threshold for Institutional Investment Managers](#)

(with M. Barth, T. Dyer, and W. Landsman), Sep 2020

Press: *IR Magazine* (Sept 2020); *Harvard Law School Forum on Corporate Governance* (Oct 2020)

Policy: Council of Institutional Investor’s Comment Letter to the SEC (Oct 2020)

[Comment Letter on the SEC’s Proposed Exemption to Internal Control Audits under SOX 404\(b\)](#)

(with M. Barth, W. Landsman, and J. Schroeder), Jul 2019

Press: *Wall Street Journal* (Jul 2019, Aug 2019, Mar 2020); *Harvard Law School Forum on Corporate Governance* (Jul 2019); *Corporate Secretary* (Aug 2019); *Internal Audit 360* (Aug 2019)

Policy: cited in the SEC’s final ruling on exemptions to 404(b) of SOX “Amendments to the Accelerated Filer and Large Accelerated Filer Definitions” *SEC Release No. 34-88365*. cited in speech by SEC Commissioner Allison Herren Lee (Mar 2020); comments letters to the SEC by Council of Institutional Investors (Feb 2020), Better Markets (Feb 2020), and CFA Institute (Feb 2020)

CONFERENCE DISCUSSIONS AND PANELS

“Causality Redux” 2021 Journal of Accounting and Economics Conference

“Research on Forensic Finance and Accounting” 2021 UT Symposium on Financial Market Policy Development & Research

“How policy-makers use academic research on disclosure and governance,” 2020 UT Symposium on Financial Market Policy Development & Research

“Theory and Inference in Accounting Research,” 2019 Stanford Theory & Inference Conference

“Surviving and Thriving in the Profession,” 2019, 2020, 2021 AAA Doctoral Consortium

“Change in Capitol: How a 60 Minutes Expose and the STOCK Act Affected the Investment Activity of U.S. Senators,” 2017 FEA Conference

“When and Why do IPO Firms Manage Earnings,” 2017 Review of Accounting Studies Conference

- Winner, Morgan-Stanley Best Discussant Prize

“Pre-IPO Communication and Analyst Research: Evidence Surrounding the JOBS Act,” 2017 NYU/SEC Changing Role of Stock Markets in Capital Formation

“Increased Creditor Rights, Institutional Investors, and Corporate Myopia,” 2016 Harvard IMO Conference

“Payoffs to Aggressiveness,” 2015 AAA Annual Meeting

“The Unification of Theory and Empirical Research and the Path toward Knowledge,” 2015 Junior Accounting Theory Conference

“Corporate Governance and Securitization Quality: The Impact of Shareholder Rights in the Banking Industry,” 2014 AAA Annual Meeting

“Earnings Co-Movement and Earnings Manipulation in Different Economic States,” 2014 FARS Mid-year Conference

“Managerial Incentives to Increase Firm Volatility Provided by Debt, Stock, and Options,” 2013 Washington University St. Louis Nick Dopuch Conference

“The Association Between Audit Committee Characteristics and Information Asymmetry,” 2013 AAA Annual Meeting

“Accounting Experts, Information Cost, and Implied Cost of Equity Capital,” 2013 AAA Annual Meeting

“Management Team Incentive Alignment and Firm Value,” 2013 FARS Mid-year Conference

INVITED PRESENTATIONS

2022: UT-Austin Law; Yale; Stanford; Harvard Law; DOJ Fraud Unit

2021: SEC Investor Advisory Committee; UT Symposium on Financial Market Policy Development & Research; Michigan State; Chinese Univ of Hong Kong; University of Maryland; SEC Enforcement; DOJ MIMF Unit; Northwestern; Minnesota; Baruch; Tilburg; UT-Dallas; SEC Division of Economic and Risk Analysis; Journal of Accounting and Economics Conference; Florida State; Review of Accounting Studies Conference; SEC Chair’s Office

2020: SEC Commission-wide seminar; Accounting Theory Group; Univ of Miami; staff of House Financial Services Committee; UT Symposium on Financial Market Policy Development & Research; NYU; Georgia; SEC Investor Advisory Committee; Iowa; Review of Accounting Studies Conference

2019: Stanford; Michigan; PCAOB; SEC Commissioner’s Office (x2); Washington Univ; Weinberg Corporate Governance Symposium; Florida; Carnegie-Mellon; Miami; Stanford Theory and Inference; Notre Dame Conference; Columbia; Indiana; Hawaii

2018: MIT; Toronto

2017: UC-Davis; Minnesota Spring Conference; NYU/SEC Changing Role of Stock Markets in Capital Formation; Review of Accounting Studies conference; FEA conference

2016: Temple; Utah; Chicago; Cornell; Harvard IMO Conference; Securities & Exchange Commission; Texas A&M; Treasury; Southern District of New York; FBI

2015: Rochester; AAA Mid-Atlantic Doctoral Consortium; Delaware; Penn State Accounting Research Conference; Colorado Summer Camp; Junior Accounting Theory Conference; AAA Annual Meeting

2014: FARS Mid-year Meeting; University of Texas Corporate Governance conference; Junior Accounting Theory Conference; AAA Annual Meeting; Stanford Summer Camp; USC; SUNY-Binghamton; Northwestern

2013: FARS Mid-year Meeting; Duke; AAA Annual Meeting; Duke/UNC Fall Camp; LBS; Washington University St. Louis Nick Dopuch Conference

INVITED CONFERENCES

- 2021: UT Symposium on Financial Market Policy Development & Research (panelist); JAE conference (presenter); RAST conference (invited participant)
- 2020: UT Symposium on Financial Market Policy Development & Research (panelist); Stanford Virtual Summer Camp (invited participant); JAR conference (invited participant); NYU Institute for Corporate Governance (invited participant); JAE conference (invited participant); RAST conference (presenter)
- 2019: Weinberg Corporate Governance Symposium (presenter); Theory and Inference in Accounting Research (moderator); Notre Dame Accounting Conference (presenter); Miami Winter Warm-Up Conference (invited participant)
- 2018: JAR conference (invited participant); NYU Summer Camp (invited participant); Harvard IMO conference (invited participant); Wharton Spring Conference (invited participant); Harvard IMO conference (invited participant); NYU Summer Camp (invited participant); Stanford Summer Camp (invited participant); Junior Accounting Theory Conference (invited participant); Toronto Summer Camp (presenter); JAR/PCAOB conference (invited participant); JAE conference (invited participant)
- 2017: Minnesota Empirical Conference (presenter); NYU/SEC Changing Role of Stock Markets in Capital Formation (discussant); JAR conference (invited participant); Wharton Spring Conference (invited participant); Review of Accounting Studies conference (discussant); JAR/PCAOB conference (invited participant); JAE conference (invited participant); FEA conference (discussant);
- 2016: JAR conference (invited participant); Harvard IMO conference (discussant); Wharton Spring Conference (invited participant); Colorado Summer Camp (invited participant); Stanford Summer Camp (invited participant); RAST conference (invited participant); JAR/PCAOB conference (invited participant); JAE conference (invited participant);
- 2015: AAA Mid-Atlantic Doctoral Consortium (presenter); Penn State Accounting Research Conference (presenter); JAR conference (invited participant); Colorado Summer Camp (presenter); Junior Accounting Theory Conference (moderator); AAA Annual Meeting (discussant); JAE conference (presenter); JAR/PCAOB conference (invited participant); Washington University Nick Dopuch Conference (invited participant);
- 2014: FARS Mid-year Meeting (presenter, discussant); University of Texas Corporate Governance conference (presenter); JAR conference (invited participant); Junior Accounting Theory Conference (presenter); AAA Annual Meeting (discussant); Stanford Summer Camp (presenter); JAE conference (presenter); Causality Conference (invited participant)
- 2013: FARS Mid-year Meeting (discussant); JAE/HBS Social Responsibility conference (invited participant); Colorado Summer Camp (invited participant); Stanford Summer Camp (invited participant); UNC Global Issues in Accounting conference (invited participant); NYU-Stern Summer Camp (invited participant); AAA Annual Meeting (discussant);

Duke/UNC Fall Camp (presenter); Washington University Nick Dopuch Conference (discussant); JAE conference (invited participant)

INTERNAL AND EXTERNAL SERVICE

Editorial Positions

Management Science	<i>Associate Editor</i>	2018 – present
The Accounting Review	<i>Editor</i>	2018 – 2022
The Accounting Review	<i>Editorial Board</i>	2017 – present
Review of Accounting Studies	<i>Editorial Board</i>	2018 – present
SSRN Accounting Theory eJournal	<i>Editorial Board</i>	2018 – present
Journal of Financial Reporting	<i>Editorial Board</i>	2016 – present
Journal of Accounting and Economics	<i>Editorial Board</i>	2015 – present
Journal of Accounting Research	<i>Editorial Board</i>	2016 – 2021
	<i>Reviewer of the Year</i>	2019

DISSERTATION COMMITTEES & PLACEMENTS

Bradford Lynch	(on the market, 2022-2023)	2023
Jung Min Kim	(Northwestern)	2022
John Kepler	(Stanford)	2019
Delphine Samuels	(MIT)	2017
Michael Carniol	(Rutgers)	2017
Jason Xiao	(University of Rochester)	2016
David Tsui	(USC)	2015
Terrence Blackburne	(University of Washington)	2013

PROFESSIONAL SERVICE

Member, WRDS Advisory Board,	2020 – present
Member, Wharton IT Steering Committee	2017 – present
Member, Wharton Rookie Recruiting Committee	2015 – present
Member, Wharton PhD Qualifying Exam Committee	2012 – present
Member, Wharton Curriculum Innovation & Review Committee	2020 – 2021
Leader, AAA/Deloitte Doctoral Consortium	2019 – 2021
Organizer & Founder, Wharton Theory Boot Camp for Empiricists	2018 – 2020
Leader, AAA New Faculty Consortium	2019
Member, FARS Meeting Editorial Committee	2017
Member, FARS Best Dissertation Award Committee	2016
Member, Wharton PhD Curriculum Committee	2016

COURSE DEVELOPMENT

EVALUATING EVIDENCE (Fall 2022 – present)

This course teaches undergraduate students basic logic, critical thinking, and research designs skills that will enable them to evaluate evidence generally. The course will apply these concepts to evaluate popular claims on pressing business and societal questions. The course will not teach the answers to these questions, but rather how one could find answers to these questions through experimentation and data analysis.

FORENSIC ANALYTICS (Spring 2019 – present)

Created this experiential course for undergraduates interested in learning how to manipulate Big Data and mine SEC filings to predict earnings, detect fraud, and flag suspicious trading behavior. The course draws on cutting-edge academic research in each topic; features industry guest speakers; introduces basic SQL coding skills; and leverages the computing power of AWS and the datasets at Wharton Research Data Services.

EMPIRICAL DESIGN IN ACCOUNTING RESEARCH (Spring 2014 – present)

Created this course for Ph.D. students looking for an advanced course on empirical methodology and research design with application to the accounting literature. The course emphasizes applied econometrics and research design rather than topical coverage of the literature [mini-versions taught at Northwestern, Stanford, and Washington University].

INTRODUCTION TO FINANCIAL ACCOUNTING (Fall 2010 – Fall 2017)

Designed a custom course pack for ~800 students.

ADDITIONAL INFORMATION

Citizenship: United States

Hobbies/Other: hiking, home renovations, landscaping, Eagle Scout