

# Curriculum Vitae

**TIMOTHY J. RUPERT**

Northeastern University  
D'Amore-McKim School of Business  
Accounting Group – 404 Hayden Hall  
Boston, MA 02115  
(617) 373-5165

## Education

- 1993 Ph.D., Penn State University, University Park, PA  
Field of Study: Accounting, Emphasis: Taxation  
Dissertation: *Performance Facilitation on Tax Rules: A Pragmatic Reasoning Schema Approach*
- 1987 M. Taxation, The University of Akron, Akron, OH
- 1986 B.S., The University of Akron, Akron, OH  
Field of Study: Accounting

## Employment Experience

- Northeastern University**, Boston, MA  
D'Amore-McKim School of Business  
Accounting Group  
Professor (July 2007 to present)  
Harold Mock Professorship (July 2003 to 2005), (July 2019 to 2021)  
Group Coordinator (department chair) (July 2011 to June 2016)  
Associate Professor (July 2000 to June 2007)  
James Carey Fellow (January 2006 to December 2010)  
Assistant Professor (September 1993 to July 2000)  
Lecturer (September 1992 to August 1993)
- University of Pretoria**, Pretoria, South Africa  
Department of Accounting  
Extraordinary Professor (honorary appointment, July 1 2020 to June 30, 2023)
- Coopers & Lybrand**, LLP, Boston, MA  
Faculty Research Internship (January – March 1996)
- Penn State University**, University Park, PA  
College of Business Administration—Department of Accounting  
Teaching Assistant (August 1987 to June 1992)

**Certifications:** Enrolled Agent (inactive)

## Scholarship/Research

### Books and Monographs

Prentice Hall's *Federal Taxation*, 2021, 2020, 2019, 2018, 2017, 2016, 2015, 2014 Editions. Editor  
2012 & 2013 Editions. Contributing Author

"The Tax Benefit Rule," Timothy J. Rupert, in *LexisNexis Tax Advisor—Federal Topical* (Matthew Bender: 2006)

### Chapters in Books and Monographs

"Chapter 14: Charitable Deductions," Hugh J. Crossland and Timothy J. Rupert, in *Preparing Fiduciary Income Tax Returns* (Massachusetts Continuing Legal Education, Inc.: 1997, revised in 2002, 2007, 2011) pp. 14-1 to 14-10.

"Chapter 18: Irrevocable Life Insurance Trusts," Hugh Crossland and Timothy J. Rupert, in *Preparing Fiduciary Income Tax Returns* (Massachusetts Continuing Legal Education, Inc.: 1997, revised in 2002, 2007, 2011) pp. 18-1 to 18-8.

"Chapter 21: Qualified Subchapter S Trusts," Hugh Crossland and Timothy J. Rupert, in *Preparing Fiduciary Income Tax Returns* (Massachusetts Continuing Legal Education, Inc.: 1997, revised in 2002, 2007, 2011) pp. 21-1 to 21-8.

### Academically Refereed Journal Publications

"The Effects of Income Tax Timing and Performance Feedback on Retirement Investment Decisions," with Shane Stinson and Marcus Doxey, *The Accounting Review* (forthcoming).

"The Effects of Level of Government and Use of Funds on Trust in Revenue Agencies," with Cass Hausserman and Susan Jurney, *Advances in Taxation* (forthcoming).

"Generational Differences in Perceptions of Tax Fairness and Attitudes Towards Compliance," with Susan Jurney and Marty Wartick, *Advances in Taxation* (2017), pp. 167-201.

"Reducing Written Communication Apprehension for Students in Tax Classes," with Tracy Noga, *Advances in Accounting Education* (2017), Volume 21, pp. 57-98.

"The Effect of Federal-State Conformity on Taxpayer Decisions," with Michael Morrow, *Advances in Taxation* (2015) pp. 37-73.

"Yours, Mine or Ours: Tax-Related Decision Responsibility of Married Couples," with Carol Fischer and Marty Wartick, *Advances in Taxation* (2014) pp. 139-172.

## Scholarship/Research (cont'd)

### Academically Refereed Journal Publications (cont'd)

The Relation among Voice Value, Policy Outcomes, and Intensity of Support on Fairness Assessments of Tax Legislation,” with Brian Hogan and James Maroney, *The Journal of the American Taxation Association* (Spring, 2013) 85-109.

“The Effect of the Timing and Direction of Capital Gain Tax Changes on Investment in Risky Assets,” with Diana Falsetta and Arnie Wright, *The Accounting Review* (March 2013) pp. 499-520.

“The Effect of Accounting Information on Taxpayers’ Acceptance of Tax Reform,” with Jim Maroney, Cynthia Jackson, and May Zhang, *The Journal of the American Taxation Association* (Spring 2012) pp.113-135.

“Effects of Converting Student Evaluations of Teaching from Paper to Online Administration,” with Sharon Bruns and May Zhang, *Advances in Accounting Education* (2011) pp. 167-192.

“The Effects of Observing a Peer’s Likelihood of Reporting Income on Tax Reporting Decisions” Martha Wartick and Timothy Rupert, *Advances in Taxation* (2010) pp. 65-94.

“Integrating Tax and Financial Accounting: Three Exercises for Use in Tax and Financial Accounting Classes,” Sharon Bruns, Diana Falsetta, and Timothy Rupert, *Advances in Accounting Education* (2008) pp. 151-187.

“Social Security Reform: Exploring the Generational and Racial Divide,” Cynthia Jackson, James Maroney, and Timothy Rupert, *Advances in Taxation* (2007) pp.65-94.

“Do Bank Mergers Have Hidden or Foregone Value? Realized and Unrealized Operating Synergies in a Bank Merger,” H. David Sherman and Timothy Rupert, *European Journal of Operations Research* (January 2006), pp. 253-268.

“An Investigation of the Use and Perceived Effectiveness of Peer Teaching Observation for Untenured Accounting Faculty,” Sharon Bruns, Cynthia Jackson, Paul Janell, and Timothy Rupert, *Advances in Accounting Education* (2005), pp. 173-192.

“The Impact of Floors and Phase-Outs on Taxpayers’ Decisions and Understanding of Marginal Tax Rates,” Timothy Rupert, Louise Single, and Arnie Wright, *The Journal of the American Taxation Association* (Spring 2003), pp. 72-86.

“The Perceived Fairness of Taxing Social Security Benefits: The Effect of Explanations Based on Different Dimensions of Tax Equity,” James Maroney, Timothy Rupert and Martha Wartick, *The Journal of the American Taxation Association* (Fall 2002), pp. 79-92.

## Scholarship/Research (cont'd)

### Academically Refereed Journal Publications (cont'd)

"The Effects of Composition and Amount of Income on Taxpayer Reporting Decisions," James Maroney and Timothy Rupert, *The Journal of Accounting and Finance Research* (Summer 2002), pp. 76-85.

"The Effects of Peer Influence on Taxpayers' Compliance Decisions," James Maroney and Timothy Rupert, *Journal of Forensic Accounting* (December 2001), pp. 237-250.

"Tax Policy and Planning Implications of Hidden Taxes: Effective Marginal Tax Rate Exercises," Carol Fischer, Timothy Rupert, and Martha Wartick, *Journal of Accounting Education* (Spring 2001), pp. 63-74.

"Alternative Minimum Tax: Bane of Middle-Income Taxpayers," James Maroney, Timothy Rupert and Carol Fischer, *CPA Journal* (April 2000), pp. 20-24, 75-76.

"Taxpayer Preferences for Tax Rate Structure: An Experimental Examination of Question Form and Framing Effects," Carol Fischer and Timothy Rupert, *Journal of Business and Behavioral Sciences* (Fall 1998), pp.109-121.

"The Use of Marginal Tax Rates in Decision Making: The Impact of Tax Rate Visibility," Timothy J. Rupert and Arnold M. Wright, *Journal of the American Taxation Association* Vol. 20, No. 2 (Fall 1998), pp. 83-99.

Taxpayer Reaction to Perceived Inequity: An Investigation of Indirect Effects and the Equity-Control Model," James Maroney, Timothy J. Rupert, and Brenda Anderson, *Journal of the American Taxation Association* Vol. 20, No. 1 (Spring 1998), pp. 60-77.

"Sensitization to the Rights and Welfare of the Participants in Accounting Research," Timothy J. Rupert and Martha L. Wartick, *Behavioral Research in Accounting* Vol. 9 (1997), pp. 250-272.

"The Effects of Firm Type and Experience on the Factors Influencing Tax Preparer Aggressiveness," Craig Bain, Valerie Milliron, and Timothy J. Rupert, *Journal of Business and Behavioral Science* Vol. 3, No. 1 (Fall 1997), pp. 96-116.

"Avoiding Potential Pitfalls of the Durable Power of Attorney," Hugh Crossland, S. Rob Fish and Timothy J. Rupert, *Journal of Financial Planning* Vol. 10, No. 5 (October 1997), pp. 92-96.

"Facilitating Performance with Cued Wording: An Examination of Reasoning in the Tax Context," Timothy J. Rupert and Martha L. Wartick, *Applied Cognitive Psychology* Vol. 11, No. 4 (August 1997), pp. 321-337.

## **Scholarship/Research (cont'd)**

### **Academically Refereed Journal Publications (cont'd)**

“An Empirical Investigation of Taxpayer Awareness of Marginal Tax Rates,” Timothy J. Rupert and Carol M. Fischer, *Journal of the American Taxation Association* Vol. 17 Supplement (1995), pp. 36-59.

### **Editorially Refereed Publications**

Rupert, T. and S. Yang. (2017). Tax Depreciation Benefits Related to Realty: An Update on Recent Changes. *Journal of Property Management* (September/October), 14-17.

Cenedella, D., Goldman, W., Rupert, T. (2016). The PATH Act of 2015: Increasing the Certainty for Federal Tax Extenders Legislation. *SumNews* (May 2016), 22-25.

Rupert, T., O'Kelly, P., Ginsberg, L. (2015). Everything Old is New Again: An Update on Recent Federal Income Tax Legislation. *SumNews*(Winter II), 4-8.

“Analysis of Rev. Proc. 2013-13: Safe Harbor Option for the Home Office Deduction” Michael Morrow, Tim Rupert, and Ron Zullo, *The Tax Adviser* (August 2013)

“Comparing International Tax Systems in the Introductory Tax Class” Tim Rupert, Tim Gagnon, and Paul Oliveira, *The Tax Adviser* (November 2010), pp. 800-804.

“Tax Return Disclosure Rules: New Regulations Reflect the Changing Environment of Tax Practice” Tim Gagnon, Paul Janell, and Tim Rupert, *SumNews* MSCP (Summer 2009) 8-10.

“Revised Preparer Penalty Provisions: New Standards and Challenges for Tax Professionals,” Tim Gagnon, Paul Oliveira, and Tim Rupert, *SumNews* MSCP (Winter 2008), pp. 5-7.

“Campus to Clients: Fitting Tax Policy into Tax Curricula,” Carol Fischer and Timothy Rupert, *The Tax Adviser* (November 2005), pp. 704-707.

### **Work in Progress**

“A Comparison of the Motivations and Predictors for the Use of Tax Preparation Software Versus Paid Preparers,” with Leigh Rosenthal, Bonnie Brown, and Julia Higgs, Revise and resubmit at *Accounting Horizons*.

“The Effect of Tax Expense Management and CSR Ratings on Investor Perceptions of Firm Value and CSR Performance,” with Ann Davis and Rebekah Moore, Under review at *Contemporary Accounting, Research*.

## Instruction

### Doctoral Student Supervision

Theresa Van Oordt, The University of Pretoria (South Africa), The Impact of Assessment Time Allocation on the Thinking Skills of Accounting Students. Co-supervisor with Madeleine Stiglingh.

Maryke Scheun, The University of Pretoria (South Africa), The Effect of Changes in Accounting for Loan Loss Provisions on Managers' Decisions. Co-supervisor with Wessel Badenhorst.

Jason Schwebke, The University of Central Florida. Committee Member.

Denice Pretorius. The University of Pretoria (South Africa). Co-supervisor with Elmar Venter.

Marcus Burke (University of Scranton). Construal Level and Tax Compliance. Second Chair.

Bonnie Brown (University of Central Florida). Decision Making in Corporate Taxation. Committee member.

### Northeastern University

#### Graduate Courses (semesters)

Business Entity Taxation	ACCT 6203
Taxation of Individuals and Business Entities	ACCT 6224
Corporations and Shareholders	ACCT 6231
Tax Research Methods	ACCT 6233
Partners and Partnerships	ACCT 6235
Current Tax Policy Issues	ACCT 6261

#### Graduate Courses (quarters)

Federal Tax I	ACC 3437
Corporate and Business Taxation	ACC 3439
Corporations and Shareholders	ACC 3451
Partners and Partnerships	ACC 3457
Tax Research Methodology	ACC 3455
Current Tax Policy Issues	ACC 3471

#### Undergraduate Courses (quarters)

Federal Income Tax I	ACC 1351
Federal Income Tax II	ACC 1512
Federal Income Tax I (University College)	ACC 4440
Federal Income Tax II (University College)	ACC 4441

### Penn State University

#### Undergraduate

Federal Income Tax	ACC 206
--------------------	---------

## **Service**

### **Professional Service**

#### **Membership in Professional Organizations and Offices Held**

##### **American Accounting Association**

Outstanding Accounting Educator Award Committee, 2018-2019, 2019-2020 (chair)

New Faculty Consortium Committee, 2017-2019

AAA Nominations Committee, 2019-2020

Intellectual Property Task Force II, 2009-2011

Tax Facilitator, Conference on Teaching and Learning in Accounting, 2008

AAA Council Member at Large, 2006-2008

New Faculty Consortium, Committee Member 2018-2020, Group Leader for  
Tax, 2004 and 2005

Northeast Region

Steering Committee, 2006-2017

Program Chair and President, 2015-2016

##### **American Taxation Association**

President (2011-2012)

President-Elect (2010-2011)

Membership Committee, 2008-2009 (chair)

Vice President, 2007-2008

Vice President-Elect, 2006-2007

Secretary, 2004-2005, 2005-2006

Trustee, 2003-2004, 2012-2013

member of the Tax Educators Conference committee, 2017-2018

member of the awards committee, 2012-2013, 2013-2014, 2014-2015 (chair),  
2019-2020

member of the nominations committee, 2012-2013, 2013-2014 (chair)

member of the long-range planning committee, 2014-2015 (chair)

member of the regional meetings committee, 2005-2006, 2008-2009,  
2009-2010 (chair)

member of the publications committee, 2003-2004, 2004-2005 (chair)

member of the mid-year meeting planning committee, 2003-2004,  
2004-2005, 2008-2009, 2009-2010, 2014-2015

member of the teaching resources committee 2002-2003 (co-chair),  
2001-2002 (co-chair)

member of the *JATA* conference committee 2001-2002

member of the concerns of new tax faculty committee, 1997-98, 1998-99, 1999-  
2000, 2000-2001 (chair)

member of annual meeting committee, 1996-97, 1994-95

member of income tax accounting policy committee, 1995-96

##### **Behavioral Tax Symposium at George Mason University,**

member of organizing committee (2009-present)

##### **Accounting, Behavior and Organizations section of AAA**

##### **National Tax Association**

## Professional Service

### Other Professional Activities

Co-Editor, *Advances in Accounting Education*, 2011- 2017

Member of Editorial Board, 2000-2011

Member of Editorial Board, *Behavioral Research in Accounting*,  
2017-2020, 2020-2023

Member of Editorial Board, *The Journal of the American Taxation Association*,  
2001-2004, 2010-2013, 2017-2019

Member of Editorial Board, *Advances in Taxation*  
2014-present

Member of Editorial Board, *Advances in Accounting Behavioral Research*,  
2013-2016

Member of Editorial Board, *Accounting and the Public Interest*,  
2016-present

Member of Editorial Board for *Income Tax Fundamentals* by Everett, Raabe and Fortin  
(1994 & 1995 editions)

Ad Hoc reviewer for *The Accounting Review*, *Accounting, Organizations & Society*; *The Journal of the American Taxation Association*, *National Tax Journal*, *Contemporary Accounting Research*, *Journal of Business Ethics*, *Research on Accounting Ethics*, *Journal of Business Research*, *Accounting Horizons*, *Behavioral Research in Accounting*, *Journal of Accounting Education*; *Advances in Accounting*

External Review for tenure/promotion decisions for the following universities:

Babson College, Bentley University, Bowling Green State University, Bucknell University (2), Duquesne University, Fordham University, George Mason University (2), Indiana University at South Bend, Louisiana State University, Oregon State University, Providence College (3), Tennessee Technological University, University of Akron, University of Colorado at Colorado Springs (2), University of Colorado, Denver, University of Delaware, University of Denver, University of Massachusetts Lowell, University of Missouri—Kansas City, University of Missouri—St. Louis, University of New Hampshire, University of New Mexico (2), University of North Florida, University of Rhode Island, University of Richmond, University of South Florida, University of Vermont (2), University of Virginia, University of Wyoming

### Refereed Presentations at Professional Meetings

“The Effect of Tax Expense Management and CSR Ratings on Investor Perceptions of Firm Value and CSR Performance” with Ann Davis and Rebekah Moore, presented at the 2016 Northeast region of the American Accounting Association.

“Addressing Written Communication Apprehension in Tax Students,” with Tracy Noga, presented at the 2014 Northeast region of the American Accounting Association, awarded best manuscript for the Teaching, Learning and Curriculum section.



## **Professional Service (cont'd)**

### **Refereed Presentations at Professional Meetings**

“Generational Differences in Perceptions of Tax Fairness and Equity,” with Marty Wartick and Susan Jurney, presented at the 2014 ATA Section midyear meeting, presented at the 2013 ABO Section midyear meeting, presented at the 2013 Northeast region of the American Accounting Association

“The Effects of Federal-State Conformity on Taxpayer Decisions,” with Michaela Morrow, presented at the 2011 ABO Section midyear meeting.

“Effects of Converting Student Evaluations of Teaching from Paper to Online Administration,” with Sharon Bruns and May Zhang, presented at the 2010 Northeast region of the American Accounting Association, awarded best manuscript for the Teaching, Learning and Curriculum section.

“The Impact of the Timing and Direction of Tax Changes on Investment in Risky Assets” with Diana Falsetta and Arnie Wright, presented at the 2010 *JATA Conference* as part of the mid-year meeting of the American Taxation Association; presented at the 2010 AAA Annual Meeting; presented at the 2010 Accounting, Behavior and Organizations section mid-year meeting.

“Effectively Reducing Carbon Emissions: A Comparison of a Carbon Tax and a Cap and Trade System” with Shawn David, presented at the 2009 Northeast regional meeting of the American Accounting Association.

“Decision Processes of Married Couples in the Tax Setting” with Carol Fischer and Marty Wartick, presented at the 2008 mid-year meeting of the Accounting, Behavior, & Organizations section of the American Accounting Association, presented at the 2008 Northeast regional meeting of the American Accounting Association.

“Incorporating International Tax Issues into the Introductory Tax Course” with Tim Gagnon and Paul Oliveira, presented at the 2008 annual meeting of the American Accounting Association; presented at the 2008 Northeast regional meeting of the American Accounting Association.

“The Effects of Observation of Peer Behavior on Tax Reporting Decisions” with Martha Wartick, presented at the 2007 Northeast regional meeting of the American Accounting Association, Hartford, CT; presented at the Forum Session of the 2006 research conference of the Accounting, Behavior, and Organizations section of the American Accounting Association, Portland, OR.

“Nuñez Security Services: Integrating Tax and Financial Accounting” with Sharon Bruns and Diana Falsetta, paper presented at the 2006 Northeast Regional Meeting of the American Accounting Association.

## **Professional Service (cont'd)**

### **Refereed Presentations at Professional Meetings (cont'd)**

“Social Security Reform: Exploring the Generational and Racial Divide” with Cynthia Jackson and James Maroney, presented at the Forum Session of the 2006 annual meeting of the American Accounting Association, Washington, D.C.; 2006 Northeast Regional Meeting of the American Accounting Association.

“The Impact of the Timing and Nature of Tax Changes on Investment in Risky Assets” with Diana Falsetta and Arnie Wright, paper presented at the 2006 Northeast Regional Meeting of the American Accounting Association.

“An Investigation of the Use and Perceived Effectiveness of Peer Teaching Observation by Accounting Faculty,” with Sharon Bruns, Paul Janell, and Cynthia Jackson, paper presented at the presented at the 2003 annual meeting of the American Accounting Association, San Antonio, TX; 2002 Northeast Regional Meeting of the American Accounting Association.

“The Effects of Composition and Amount of Income on Taxpayer Reporting Decisions,” with James Maroney, paper presented at the 2001 annual meeting of the American Academy of Accounting and Finance.

"The Effect of Tax Complexity on Taxpayers' Decisions and Fairness Perceptions," with Louise Single and Arnie Wright, paper presented at the 2001 Annual Meeting of the American Accounting Association, Atlanta, GA.

"The Effect of Tax Complexity on Taxpayers' Decisions and Fairness Perceptions," with Louise Single and Arnie Wright, paper presented at the 2001 Northeast Regional Meeting of the American Accounting Association, Portland, ME.

"Do Bank Mergers Have Hidden or Foregone Value? Realized and Unrealized Operating Synergies in a Bank Merger,” with H. David Sherman, paper presented at 2000 Northeast Regional Meeting of the American Accounting Association, Boston, MA.

"Accounting Method Negotiations Between Corporate and Tax Authorities: A Historical Perspective Based on the 1944 Tax Audit of the Springfield Street Railway Company," with Sharon Bruns, paper presented at the 2000 American Society of Business and Behavioral Sciences annual meeting, Las Vegas, NV.

"The Effects of Peer Influence on Taxpayers' Compliance Decisions," with James Maroney, paper presented at the 2000 American Society of Business and Behavioral Sciences annual meeting, Las Vegas, NV.

## **Professional Service (cont'd)**

### **Refereed Presentations at Professional Meetings (cont'd)**

“Targeting Appeals to Fairness: The Effects of Explanations Based on Different Dimensions of Tax Fairness,” James J. Maroney, Timothy J. Rupert and Martha L. Wartick, presented in the Forum Session at the 1999 American Accounting Association annual meeting, San Diego, CA; 1999 Northeast Regional Meeting of the American Accounting Association, Rochester, NY.

“The Effect of Composition and Amount of Income on Taxpayer Reporting Decisions,” James J. Maroney and Timothy J. Rupert, presented at the 1999 American Society of Business and Behavioral Sciences annual meeting, Las Vegas, NV.

“Taxpayer Preferences for Tax Rate Structure: An Experimental Examination,” Carol M. Fischer and Timothy J. Rupert, presented at the 1998 American Society of Business and Behavioral Sciences annual meeting, Las Vegas, NV; 1998 Northeast Regional Meeting of the American Accounting Association, Manchester, NH.

“Taxpayer Reaction to Perceived Inequity: An Investigation of Indirect Effects and the Equity-Control Model,” James J. Maroney, Timothy J. Rupert, and Brenda Anderson, presented at the 1997 Accounting, Behavior and Organizations Research Conference, Pittsburgh, PA.

“The Use of Marginal Tax Rates in Decision-Making: The Impact of Visibility,” Timothy J. Rupert and Arnold M. Wright, presented in the Forum Session at the 1997 American Accounting Association annual meeting, Dallas, TX; 1997 Northeast Regional Meeting of the American Accounting Association, Binghamton, NY.

“The Durable Power of Attorney as a Wealth Transfer Planning Tool,” Hugh Crossland, S. Rob Fish and Timothy J. Rupert, presented at the 1997 Northeast Regional Meeting of the American Accounting Association, Binghamton, NY.

“The Effects of Firm Type and Experience on the Factors Influencing Tax Preparer Aggressiveness,” Craig Bain, Valerie Milliron, and Timothy J. Rupert, presented at the 1997 American Society of Business and Behavioral Sciences annual meeting, Las Vegas, NV.

“The Effect of Perceived Fairness of Specific Provisions on Compliance and the Perceived Fairness of the Tax Burden,” James J. Maroney, Timothy J. Rupert, and Brenda Anderson, paper presented at the 1996 Northeast Regional Meeting of the American Accounting Association, New York, NY.

“The Use of Technology and Planning for Teaching Tax,” paper presented at the 1995 meeting of the International Society for Intercommunication of New Ideas, Boston, MA.

## **Professional Service (cont'd)**

### **Refereed Presentations at Professional Meetings (cont'd)**

“An Empirical Investigation of Taxpayer Awareness of Marginal Tax Rates,” Timothy J. Rupert and Carol M. Fischer, presented at the 1995 Conference of *The Journal of the American Taxation Association*, San Antonio, TX; the 1995 Northeast Regional Meeting of the American Accounting Association, Hartford, CT.

“Facilitation of Reasoning in Taxation: An Examination of the Obligation Schema,” paper presented at the 1994 Northeast Regional Meeting of the American Accounting Association, Buffalo, NY.

“Deductive Reasoning within the Tax Domain,” Timothy J. Rupert and Martha L. Wartick, presented at the 1990 mid-year meeting of the American Taxation Association, Atlanta, GA.

### **Other Presentations**

“Maintaining a research agenda while leading a department” panel at the 2018 AAA Annual Meeting, August 2018, Washington, DC.

“Learn from Master Teachers: Applying Effective Teaching Strategies to Tax Classes,” panel at the 2018 ATA Teaching & Curriculum Conference, February 2018, New Orleans.

“Tax Education Research: Insights in Publishable Tax Education Research,” panel presentation at the 2015 ATA Teaching & Curriculum Conference, February 2015, Washington, DC.

“Opportunities in Behavioral Tax Research” presented with Anne Magro to the 2014 ATA Doctoral Consortium.

“Developing Your Teaching Philosophy,” presented to the DMSB faculty, August, 2014, January 2014, November 2010.

“Current and Future Directions in Behavioral Tax Research,” panel presentation at the 2013 AAA Annual meeting, August 2013.

“New Directions in Tax Policy: Challenges and Current Legislation,” part of the Social Investing Series for Boston Private Bank, April 2009.

“Encouraging Student Participation in Class Discussions” with Julie Hertenstein and Bruce Russell, presented to CBA faculty, November 2008.

## **Professional Service (cont'd)**

### **Other Presentations (cont'd)**

“Integrating Tax and Financial Accounting: Three Exercises” Diana Falsetta and Timothy J. Rupert (with Sharon Bruns as co-author) presented in San Antonio, TX, sponsored by the American Taxation Association, February 2007.

“How to Increase Class Discussion – The Best of Traditional Classroom and On-Line Techniques,” Julie Hertenstein, Ed Monsour, and Timothy J. Rupert, presented in Denver, CO, sponsored by the American Taxation Association, February 2004.

“The Changing CPA Exam: Are Your Students Prepared?” Tom Omer and Timothy J. Rupert, presented in St. Petersburg, FL, sponsored by the American Taxation Association, February 2003.

“Preparing Your Own Tax Return” invited speaker for Dudley Street Neighborhood Initiative, March 2001, February 2002, March 2002, March 2003.

“Partnership Allocation and Sec. 704(c)” invited speaker for PwC Tax and Legal Services monthly training, November 2003.

“New CPA Rules in Massachusetts” invited speaker for Western Chapter of the Mass. Society of CPAs, January 2003.

“Taxes for Young Professionals” invited speaker for Young Professional Network of the Urban League of Eastern Mass., March 2002.

“Money Strategies: Financial Planning” invited speaker for Dudley Street Neighborhood Initiative, January-February 2002, March-April 2002.

“Taxes and Financial Decisions” invited speaker for Dorchester Community Education, March 2001.

“Taxes and Small Business” invited speaker for Boston Empowerment Center, May 2000.

“Tax Issues for College Students” invited speaker for Stetson West Residence Hall Association, March 2000

“The Use of Marginal Tax Rates in Decision-Making: The Impact of Tax Visibility,” Timothy J. Rupert and Arnold M. Wright, presented at Northeastern University, Accounting Group Research Seminar, January 1997.

“Taxes: Taking Charge of the Process,” invited speaker as part of the Business Lunch Series for College of Business Administration Alumni at Northeastern University.

## **Professional Service (cont'd)**

### **Other Presentations (cont'd)**

“Taxpayer Reaction of Perceived Inequity: An Investigation of Indirect Effects and the Equity-Control Model,” James J. Maroney, Timothy J. Rupert, and Brenda Anderson, presented at Northeastern University, Accounting Group Research Seminar, February 1996.

“Associate Members and Taxes,” invited speaker to the national meeting of the National Association for Campus Activities, Nashville, TN, February 1996.

“Sensitization to the Rights and Welfare of the Participants in Accounting Research,” Timothy J. Rupert and Martha L. Wartick, presented at Northeastern University, Accounting Group Research Seminar, April 1995.

“The Flat Tax—Is It Fair?” presented to Beta Alpha Psi (accounting honorary society) at Northeastern University, March 1995.

“The Use of Marginal Tax Rates in Decision Making: Changing Rate Structures and Tax Visibility,” Timothy J. Rupert and Arnold M. Wright, presented at the Boston

College Accounting Research Seminar (December 1994) and the Northeastern University Accounting Research Seminar (November 1994).

“Taxpayer Awareness of Marginal Tax Rates,” Timothy J. Rupert and Carol M. Fischer, presented to the New England Behavioral Accounting Research Seminar, May 1994.

“Associate Members and the Tax Law,” invited speaker for the National Association for Campus Activities, Boston, MA, February 1994.

“The New Tax Bill: Is It Fair?” presented to Beta Alpha Psi (accounting honorary society) at Northeastern University, August 1993.

## **Public Service**

1993-2015	Community Tax Aid of Boston, Inc. Board of Directors, Director of Volunteer Training, 1994-present Manager of Dudley Street Neighborhood Initiative/Vine Street Community Center preparation Center (1999-2010) Manager of Northeastern University preparation center (1994-1998, 2000-2015)
1994-2015	FriendshipWorks (formerly, Match-Up Interfaith Volunteers) Accounting and Financial Reporting Volunteer (2008- 2015) Medical Escort Volunteer 1994-2010 Treasurer, Fall 2001-2008

Board of Directors, 2000-2008

**Public Service (cont'd)**

2005-2011	Great Dog Rescue New England Home Evaluator for Potential Adopters
1999-2007	Jesuit Urban Center Finance Committee (2005-2007)
1993-1998	St. Lawrence Parish, Chestnut Hill Social Service Committee (1996-1998)

**Awards and Honors**

Hall of Fame Award, Northeast Region of the American Accounting Association, 2012.

Outstanding Accounting Alumnus Award, 2010, The University of Akron.

Outstanding Service Award, American Taxation Association, 2010

MSCPA Educator of the Year Award, 2010.

Best Teacher Hall of Fame, Beta Gamma Sigma, Northeastern University, 2008.

Best Teacher Award, Beta Gamma Sigma, Northeastern University, 2008.

Best Teacher Award, Beta Gamma Sigma, Northeastern University, 2007.

Excellence in Teaching Award, Northeastern University, 2005

Effective or Innovative Use of Technology Award (Course Enhancement), Northeastern University, 2005

President's Aspiration Award, Northeastern University, 2002

Best Teacher Award, Beta Gamma Sigma, Northeastern University, 2001

Excellence in Teaching Award, Northeastern University, 1996.

Beta Alpha Psi, honorary member, 1993

Outstanding Graduate Teaching Assistant for the Social and Behavioral Sciences, Penn State University, 1991.

Ossian R. MacKenzie Doctoral Teaching Award, Penn State University, 1991.

Fred Brand, Jr. Outstanding Graduate Student Teacher Award, Penn State University, 1990.

**Awards and Honors (cont'd)**

American Accounting Association Doctoral Consortium Fellow, 1990.

Penn State University Dean's Fellowship, 1987-88.