

# DOCTORAL CONSORTIUM

**JUNE 9-12, 2024**

**DELOITTE UNIVERSITY  
WESTLAKE, TEXAS**



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# 2024 DOCTORAL CONSORTIUM

Westlake, Texas • June 9–12, 2024

Sponsored by the American Accounting Association  
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## DISTINGUISHED FACULTY

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Jennifer L. Blouin, University of Pennsylvania  
Khrystyna Bochkay, University of Miami  
Jason Brown, Indiana University  
Carolyn M. Callahan, University of Louisville  
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## AAA REPRESENTATIVE

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Utah Valley University

**Robert D. Allen (Bob)**

DEGREES: B.S., Brigham Young University, 1986

M.Acc., Brigham Young University, 1986

Ph.D., Michigan State University, 1992

ASSOCIATED ACCOUNTING ACTIVITIES: President, American Accounting Association, 2021–2022; Dean, Woodbury School of Business, 2023–Present; Council Chair, American Accounting Association, 2011–2013; Chair, AAA Teaching, Learning, & Curriculum Section, 2010–2012; Donor’s Representative, AAA/J. Michael and Mary Anne Cook/Deloitte Foundation Teaching Prize, 2022–Present.

SELECTED PUBLICATIONS: A Longitudinal Field Investigation of Auditor Risk Assessments and Sample Size Decisions, with R. Elder, *The Accounting Review*, 2003; A Longitudinal Field Investigation of Auditor Error Projection Decisions, with R. Elder, *Auditing: A Journal of Practice & Theory*, 2005; Auditor Risk Assessments: Insight from the Academic Literature, with Hermanson, Kozlowski, and Ramsey, *Accounting Horizons*, 2006; Winter Oak: Inspiring Passion for Teaching, with D. Hermanson and A. Gramling, *Issues in Accounting Education*, 2019; Thinking Like an Auditor: Evaluating Information to Arrive at Evidence-Based Conclusions, *Accounting Horizons*, 2023.

RESEARCH INTERESTS: Auditor Risk Assessments; Analytical Procedures; Audit Evidence; Education Research.



University of Pennsylvania

**Jennifer L. Blouin**

DEGREES: B.A., Indiana University, 1992

Ph.D., The University of North Carolina at Chapel Hill, 2004

ASSOCIATED ACCOUNTING ACTIVITIES: Editor, *Review of Accounting Studies*, 2018–Present, Associate Editor, *Journal of Accounting Research*, 2019–Present, AAA Publications Committee, 2017–2020, TAR Steering Committee, 2017–2020, Editorial Board, *Journal of Accounting and Economics*, 2017–Present.

SELECTED PUBLICATIONS: Corporate Tax Cuts, Merger Activity and Shareholder Wealth, with Eli Fich and Anh Tran, *Journal of Accounting and Economics*, 2021; Does Tax Aggressiveness Reduce Financial Accounting Transparency? with Karthik Balakrishnan and Wayne Guay, *The Accounting Review*, 2019; Conflicting Transfer Pricing Incentives and the Role of Coordination, with Leslie Robinson and Jeri Seidman, *Contemporary Accounting Research*, 2018; Measuring Tax-Sensitive Institutional Ownership, with Brian Bushee and Stephanie Sikes, *The Accounting Review*, 2017; Corporate Governance, Incentives and Tax Avoidance, with Chris Armstrong, Alan Jagolinzer, and Dave Larcker, *Journal of Accounting and Economics*, 2015.

RESEARCH INTERESTS: Taxation; Financial Reporting; Governance; Public Finance.



University of Miami

**Khrystyna Bochkay**

DEGREES: Ph.D., Rutgers, The State University of New Jersey, 2014

ASSOCIATED ACCOUNTING ACTIVITIES: Editorial Board, *The Accounting Review*, 2022–Present; Track, Reviewer, Discussant, Member of Steering Committees for AAA and other Accounting Conferences and Meetings; Academic Advisor at the International Sustainability Standards Board, IFRS Foundation.

SELECTED PUBLICATIONS: Hyperbole or Reality? Investor Response to Extreme Language in Earnings Conference Calls, with J. Hales and S. Chava, *The Accounting Review*, 95 (2): 31–60, 2020; Dynamics of CEO Disclosure Style, with R. Chychyla and D. Nanda, *The Accounting Review*, 94 (4): 103–140, 2019; Management Disclosures of Going-Concern Uncertainties: The Case of Initial Public Offerings, with R. Chychyla, S. Sankaraguruswamy, and M. Willenborg, *The Accounting Review*, 93 (6): 29–59, 2018; Macroeconomic Uncertainty and Quantitative vs. Qualitative Inputs to Analyst Risk Forecasts, with P. Joos, *The Accounting Review*, 96 (3): 59–90, 2021; The Roles of Data Providers and Analysts in the Production, Dissemination, and Pricing of Street Earnings, with M. Subasi, S. Markov, and E. Weisbrod, *Journal of Accounting Research*, 60 (5): 1695–1740, 2022; Using Python for Text Analysis in Accounting Research. With Vic Anand, Roman Chychyla, and Andrew Leone, *Foundations and Trends® in Accounting*, 14 (3–4): 128–359, 2020; Textual Analysis in Accounting: What's Next? with Stephen V. Brown, Andrew J. Leone, and Jennifer Wu Tucker, *Contemporary Accounting Research*, 40 (2): 765–805, 2023.

RESEARCH INTERESTS: Empirical Capital Markets; Mandatory and Voluntary Disclosures; Disclosure Strategies; Environmental, Social and Governance Reporting and Actions; Market Participants' Use of Information; Textual Analysis.



Indiana University

**Jason Brown**

DEGREES: B.B.A., Howard University, 1994

M.B.A., Indiana University, 1998

Ph.D., University of Pittsburgh, 2009

ASSOCIATED ACCOUNTING ACTIVITIES: Editorial Board, *The Accounting Review*, 2020–Present, Editorial Board, *Journal of Management Accounting Research*, 2016–Present, The Tenure Project Senior Planning Committee Member, 2022, AAA Accounting, Behavior & Organizations Publications Committee Chair, 2020–2023, Management Accounting Section Ph.D. Colloquium Co-Director, 2019–2021.

SELECTED PUBLICATIONS: How Return on Investment and Residual Income Performance Measures and Risk Preferences Affect Risk-Taking, with Patrick Martin, Geoff Sprinkle, and Dan Way, *Management Science*, 69, 1301–1322, 2022; The Effects of Multi-Level Group Identification on Intergroup Cooperation, with Goff Sprinkle and Dan Way, *Journal of Management Accounting Research*, 34, 97–116, 2022; The Effect of Budget Frame and Budget-Setting Process on Managerial Reporting, with Joe Fisher, Sean Peffer, and Geoff Sprinkle, *Journal of Management Accounting Research*, 29, 31–44, 2017; Does Investors' Desire to Punish Misreporting Affect Their Litigation Decisions and Managers' and Investors' Welfare, with Donald Moser, *Behavioral Research in Accounting*, 29, 57–75, 2017; Biased Self-Assessments, Feedback and Employees' Compensation Choices, with Sukari Farrington and Geoff Sprinkle, *Accounting, Organizations and Society*, 54, 45–59, 2016; The Effect of Alternative Accounting Measurement Bases on Investors' Assessments of Managers' Stewardship, with Spencer Anderson, Leslie Hodder, and Patrick Hopkins, *Accounting, Organizations and Society*, 46, 100–114, 2015; The Consequences of Hiring Lower-Wage Workers in an Incomplete-Contract Environment, with Patrick Martin, Donald Moser, and Roberto Weber, *The Accounting Review*, 90 (3), 941–966, 2015; The Effect of Rankings on Honesty in Budget Reporting, with Joe Fisher, Matthew Sooy, and Geoff Sprinkle, *Accounting, Organizations and Society*, 39 (4), 237–246, 2014; Agency Theory and Participative Budgeting Experiments, with Harry Evans and Don Moser, *Journal of Management Accounting Research*, 21, 317–345, 2009.

RESEARCH INTERESTS: Managerial Control and Incentives; Performance Evaluation; Regulation; Experimental Economics.



University of Louisville

**Carolyn M. Callahan**

DEGREES: B.S.B.A., Ohio Northern University, 1977

M.Acc., Bowling Green State University, 1978

Ph.D., Michigan State University, 1986

Concentrations: Accounting and Finance

ASSOCIATED ACCOUNTING ACTIVITIES: PhD Project, Founding Program Faculty, 1994–1999; FASB Summer Faculty Fellow, 1997; FASB Financial Accounting Standards Advisory Committee, 2004–2007.

AMERICAN ACCOUNTING ASSOCIATION: Editor, *Accounting Horizons*, 2021–Present; Editorial Boards: *The Accounting Review*, 1999–2020; *Accounting Horizons*, 1998–2002; Competitive Manuscript Award Committee, 1996; Council Member, 1995–1997; Nominations Committee Member, 1998; Member New Faculty Consortium, 1995–1997; New Faculty Consortium Chairperson, 1999; *New Faculty Consortium* Group Leader on Capital Markets Research; Vice President, 2003–2005; Global Initiation Conference Task Force (Taipei Taiwan) 1999; Program Chair Second Globalization Conference Chair, Cambridge, England, 2000; Financial Accounting and Reporting Section Best Dissertation Committee, 2004–2005; Executive Council Member, Financial Accounting and Reporting Section 2007; Doctoral Student Consortium Director, International Reporting Section, 2007–2010; *The Accounting Review*

Steering Committee, 2022–2024; AAA/Deloitte/J. Michael Cook Doctoral Consortium Committee, 2022–2024; AAA/Deloitte/J. Michael Cook Doctoral Consortium 2024, Chair.

PROFESSIONAL: Brown-Forman Endowed Chair, Accountancy, 2014–Present; University of Louisville, Vice-Provost Faculty Affairs, 2014–2016; Dean College of Business, 2013–2014; University of Memphis, Director of the School of Accountancy and PhD Coordinator, 2009–2014; University of Arkansas, Associate Vice-Provost for Academic Affairs (Graduate School).

SELECTED PUBLICATIONS: Do Competitive Markets Encourage Tax Aggressiveness? with James M. Plečnik and Jiwoo Ryou, *Advances in Accounting*,

2023; Debt Contract Strictness and Auditor Specialization, with G. F. Peters and J. H. Zhang, *Journal of Business Finance & Accounting*,

2019; The GASB 34 Impact of Budget-to-Actual Variances on Bond Ratings: Evidence from U.S. Cities, with T. Waymire, *Journal of Governmental & Nonprofit Accounting*, 2015; An Examination of the Cost of Capital Implications of Financial Interpretation 46, with Angela Spencer and Rod Smith, *The Accounting Review*, 87 (4): July 2012; The Cost of Debt and Capital Expenditures in the Defense Industry: The Economic Impact of Implied Facilities Cost of Money Subsidies, with V. Vendirzyk and M. Butler, *Journal of Accounting and Public Policy*, 301–331, 2012; Earnings Predictability, Information Asymmetry, and Market Liquidity, with J. Affleck-Graves and N. Chipalkatti, *Journal of Accounting Research*, 40: June 2002; Tax and Regulatory Motivations for Issuing Preferred Stock, with B. Terando and W. Shaw, *Journal of Accounting Research*, 39 (3): 2001; The Differential Impact of Accurate Product Cost Information in Imperfectly Competitive Markets: A Theoretical and Empirical Investigation, with E. Ann Gabriel, *Contemporary Accounting Research*, Winter 1998.

RESEARCH INTERESTS: Theoretical Capital Markets: Empirical Examinations of Costly Frictions.



University of Georgia

**John L. Campbell**

DEGREES: B.S., Wake Forest University, 2001

M.S.A., Wake Forest University, 2001

Ph.D., The University of Arizona, 2010

ASSOCIATED ACCOUNTING ACTIVITIES: Editor, *Review of Accounting Studies*, 2024–Present; Editor, *Contemporary Accounting Research*, 2020–2024; Editorial Board, *The Accounting Review*, 2020–Present; New Faculty Consortium Plenary Speaker, 2021–Present; AAA/Deloitte Foundation/J. Michael Cook Doctoral Consortium Panelist, 2022–Present.

SELECTED PUBLICATIONS: Time-Series Variation in the Efficacy of Executive Risk-Taking Incentives: The Role of Uncertainty, with Brian Cadman and Ryan Johnson, *The Accounting Review*, 99: 113–141, 2024; The Implications of Firms' Derivatives Use on the Frequency and Usefulness of Management Earnings Forecasts, with Sean Cao, Hye-Sun Chang, and Raluca Chiorean, *Contemporary Accounting Research*, 40: 2409–2445, 2023; The Association Between Current Earnings Surprises and the Ex-Post Bias of Concurrently Issued Management Forecasts, with Steve Baginski, Patrick Ryu, and James Warren, *Review of Accounting Studies*, 28: 2104–2149, 2023; The Determinants and Informativeness of Non-GAAP Revenue Disclosures, with Kurt Gee and Zac Wiebe, *The Accounting Review*, 97: 23–48, 2022; Executive Risk-Taking Incentives and Voluntary Disclosure Accuracy, with Steve Baginski, Robbie Moon, and James Warren, *Journal of Financial Reporting*, 7: 25–47, 2022.

RESEARCH INTERESTS: Investor Use of Accounting and Tax Information; Financial Reporting; Regulation; Emerging Technologies.



Miami University

**Po-Chang Chen**

DEGREES: B.A., National Taiwan University, 2000

M.B.A., National Taiwan University, 2002

Ph.D., University of Illinois at Urbana-Champaign, 2012

ASSOCIATED ACCOUNTING ACTIVITIES: Guest Editor, Special Issue on Sustainability Accounting and Reporting at Sustainability, 2020–2022; Editorial Board, *The International Journal of Accounting*, 2019–Present; Financial Accounting and Reporting Midwest Region Coordinator, 2023–Present.

SELECTED PUBLICATIONS: Banks' Acquisition of Private Information About Financial Misreporting, with B. Ballou, J. Grenier, and D. Heitger, *The Accounting Review*, 91 (3): 835–857, 2016; Corporate Social Responsibility Assurance and Reporting Quality: Evidence from Restatements, with Q. L. Burke and G. J. Lobo, *Journal of Accounting and Public Policy*, 37, 167–188, 2018; Is Corporate Social Responsibility Performance Related to Conditional Accounting Conservatism? with G. S. Narayanamoorthy, T. Sougiannis, and H. Zhou, *Accounting Horizons*, 34 (2): 19–40, 2020; Analyst Underreaction and the Post-Forecast Revision Drift, with W. Moser and G. S. Narayanamoorthy, *Journal of Business Finance & Accounting*, 2020; Are All Types of Real Transaction Management Equal in the Eyes of Bank Lenders? *Journal of Business Finance & Accounting*, 2022.

RESEARCH INTERESTS: Financial Reporting Quality; Restatements; Bank Loan Contracting; Accounting Conservatism; CSR.





University of São Paulo

**Edgard B. Cornacchione, Jr.**

DEGREES: B.Sc., University of São Paulo, 1990

M.Sc., University of São Paulo, 1994

Ph.D., University of São Paulo, 1999

Ph.D., University of Illinois at Urbana-Champaign, 2008

**ASSOCIATED ACCOUNTING ACTIVITIES:** Member of IFAC (IPAE), since 2024; Council Member of IAAER, since 2013; Member of the AAA/AIS, 2011–2013; President of the Brazilian Accounting Foundation (FIPECAFI), 2021–2023; Board Member of Brazilian Accounting Standards Board Foundation (FACPCS), 2021–2023; Edgard Cornacchione is Full Professor (Department of Accounting) at the University of São Paulo. He was appointed the Comptroller-General at the University of São Paulo (since 2022); Scientific Director at Brazilian Accounting Association – ANPCONT, 2010–2013; Advisor on Cyber Risks for the Brazilian Public Companies Association – ABRASCA, since 2022; Board Member at Brazilian Accounting Foundation – FIPECAFI, since 2010 and ConferIR Tax Services, since 2023; Fiscal Board Member at CIETEC, 2003–2004; He is a licensed accountant (BR CPA), with independent auditor (CNAI) and forensic accounting (CNPC, court expert witness) credentials. In his career, he advised 39 graduate students (17 Doctoral and 22 Master's level). He is an active member of the Editorial Board of these journals: *Accounting Education: An International Journal* (UK); *Human Resource Development International* (US); *Capic Review* (Chile); *Accounting & Finance Review* (RCF, Brazil); *Advances in Scientific and Applied Accounting* (ASAA, Brazil); *Accounting and Controllership Review* (RCC, Brazil); and *Accounting Education and Research Review* (REPeC, Brazil).

**SELECTED PUBLICATIONS:** The Relationship Between Culture, Controller Behavior and Corporate Performance in Large Brazilian Companies, with L. Reginato and D. C. Collatto, *International Studies of Management and Organization*, 2023; Transfer of Learning in Accounting Programs, with L. Reginato, S. O. Durso, and C. Nascimento, *International Journal of Management Education*, 2022; Agent-Based Model and Management Accounting: Culture-Contingent Managerial Behavior in Light of Budgetary Constraints, with L. Reginato, *Advances in Scientific and Applied Accounting*, 2021; Cognitive Brain-Mapping of Auditors and Accountants in Going Concern Judgments, with C. V. O. Carvalho, Jr, A. F. Rocha, and F. T. Rocha, *Accounting and Finance Review* (RCF), 2019; Ethical Cultures in Large Business Organizations in Brazil, Russia, India, and China, with A. Ardichvili, D. Jondle, B. Kowske, J. Li, and T. Thakadipuram, *Journal of Business Ethics*, 2012; Dynamic Pricing Models and Negotiating Agents, *Administrative Sciences*, 2023; Gamification in Accounting and Students' Skillset, *Advances in Scientific and Applied Accounting*, 2019; You Never Know: The Journey into Convincing Ourselves, *International Journal of Multivariate Data Analysis*, 2016; The Accounting Education Gap in Brazil, *Usa-China Business Review*, 2013; Evaluation Use and Involvement of Internal Stakeholders, *Studies in Educational Evaluation*, 2010.

**RESEARCH INTERESTS:** Emerging Technologies; Strategy; Risk and Control; Compliance; Corporate Performance; Sociotechnical Disruption and its Effects on Accounting, Individual Development and Organizational Performance.





Harvard University

**Susanna Gallani**

DEGREES: Ph.D., Michigan State University, 2015

ASSOCIATED ACCOUNTING ACTIVITIES: Editorial Board Member of *Management Accounting Research* 2023–Present; Member of the Editorial Review Board of Production and Operations Management 2022–Present; Member of the Editorial Advisory and Review Board of the *Journal of Management Accounting Research* 2022–2024; Member of the Editorial Liaison to Management Accounting Practice Committee 2022–2024.

SELECTED PUBLICATIONS: Enhancing Value and Well-Being: The Basket of Motivators Framework for Aligning Neurology Clinical Practices with Performance Outcomes, *Neurology Clinical Practice*, 14 (3): Spring 2024; Effects of Systems of Management Controls on Honesty in Managerial Reporting, with Aishwarya Deore and Ranjani Krishnan, *Accounting Organizations and Society*, 105, February 2023; Conduit Incentives: Eliciting Collaboration from Workers Outside of Managers' Control. Evidence from Hospital Handwashing, *The Accounting Review*, 93 (3): 1–28; Incentive Contract Design and Employee-Initiated Innovation: Evidence from the Field, with Wei Cai and Jee Eun Shin, *Contemporary Accounting Research*, 40 (1): 292–323, Spring 2023; Incentive Effects of Subjective Allocations of Rewards and Penalties, with Wei Cai and Jee Eun Shin, *Management Science*, 69 (5): 3121–3139, May 2023; Variance Analysis: New Insights from Healthcare Applications, with Robert Kaplan, *Issues in Accounting Education*, 37 (2): 27–36, May 2022; Value of New Performance Information in Health Care: Evidence from Japan, with Takehisa Kajiwara and Ranjani Krishnan, *International Journal of Healthcare Economics and Management*, 20 (4): 319–357, 2020; Budgeting, Psychological Contracts, and Budgetary Misreporting, with Ranjani Krishnan, Eric Marinich, and Mike Shields, *Management Science*, 6, 2924–2945, 2019; Successfully Implementing TDABC in Health Care Provider Organizations, with Gregory Sabin, *Journal of Cost Management*, 29–33, 2021; 4 Strategies to Make Telehealth Work for Elderly Patients, with Umar Ikram, Jose F. Figueroa, and Thomas W. Feeley, *Harvard Business Review*, Digital Article—November 24, 2020; Protecting Vulnerable Older Patients during the Pandemic, with Umar Ikram, Jose F. Figueroa, and Thomas W. Feeley, *NEJM Catalyst Innovations in Healthcare Delivery*, Digital Article—September 17, 2020.

RESEARCH INTERESTS: Management Accounting; Incentives; Compensation; Performance Management Systems; Health Care.



University of Houston

**George O. Gamble**

DEGREES: B.A., Florida A&M University, 1973

M.B.A., The Pennsylvania State University, 1975

Ph.D., The Pennsylvania State University, 1980

ASSOCIATED ACCOUNTING ACTIVITIES: Editorial Board, *Accounting Horizons*, 1994–1997; AAA/ Deloitte Foundation/J. Michael and Mary Anne Cook Teaching Prize Selection Committee, 2022–2024; Chairperson, 2007–2008; International Accounting Section Teaching and Curriculum Committee, 1987–1988; Member, Committee on Future Libraries in Accounting, 1985–1986; Chairperson, Committee on Minority Faculty Development, 1984–1986; Group Leader, Accounting Literature Award Committee of the Alpha Kappa Psi Foundation, 1989; New Faculty Consortium.

SELECTED PUBLICATIONS: The Formulation of Financial Statements: A Proposal for Change, with Cynthia D. Tollerson, *Accounting Horizons*, 37 (4): 51–65, 2023; The Role of Present Value in the Measurement of Nonmonetary Financial Assets and Liabilities: An Examination, with Joe J. Cramer, Jr., *Accounting Horizons*, 6 (4): 32–41, 1992; Environmental Disclosures In Annual Reports and 10Ks: An Examination, with Kathy Hsu, Kite Devaun, and Robin Radtke, *Accounting Horizons*, 9 (3): 34–54, 1995; Sustainability and Firm Performance: A Review and Analysis Using Algorithmic Pathways in the Throughput Model, with Waymond Rodgers and Mouza Al Habsi, *Sustainability*, 11 (14): 3783, 2019; Fundamental-Equity Investors Decision-Context Framework and Employment Taxonomy, with Cynthia D. Tollerson and Wynne W. Chin, *Journal of Management Policy and Practice*, 19 (3): 50–73, 2018; Segment Data Decision-Usefulness Prediction Model: An Exploration, with Cynthia D. Tollerson, Wynne W. Chin, Michael J. Murray, and Chun-Chia Chang, *Journal of Accounting and Finance*, 17 (8): 71–96, 2017; An Investigation of the Impact Publicly Available Accounting Data, Other Publicly Available Information and Management Guidance on Analysts Forecasts, with Michael R. Newman, Wynne W. Chin, and Michael J. Murray, 7th International Conference on Partial Least Squares and Related Methods, Houston, TX, May 19–22, 2012 (also reprinted in H. Abdi, W. W. Chin, V. E. Vinzi, G. Russolillo, and L. Trinchera (Eds.), *New Perspectives in Partial Least Squares and Related Methods*, Springer Proceedings in Mathematics & Statistics (Book 56), Berlin: Springer-Verlag, 315–339); Environmental Disclosures in Annual Reports: An International Perspective, with Kathy Hsu, Cynthia Jackson, and Cynthia Tollerson, *The International Journal of Accounting*, 31 (3): 293–332, 1996; Property Rights Theory and the Formulation of Financial Statements, *Journal of Accounting, Auditing & Finance*, 1 (2): New Series, 102–117, 1986; How Accounting Academicians Can Use Citation Indexing & Analysis for Research, with Brian O'Doherty, *Journal of Accounting Education*, 3 (2): 123–144, 1985; Citation Indexing and its Uses in Accounting: An Awareness Survey and Departmental Ranking, with Brian O'Doherty, *Issues in Accounting Education*, 28–40, 1985; Birth Order and the Type A Coronary Behavior Pattern: Is There a Link? with John M. Ivancevich and Michael M. Matteson, *Individual Psychology*, 1987; A Test of the Cognitive Social Learning Model of Type A Behavior, with Michael T. Matteson and John M. Ivancevich, *Journal of Human Stress*, Spring 1987.

RESEARCH INTERESTS: Financial Reporting.



University of South Florida

**Lisa M. Gaynor**

DEGREES: B.S., University of Florida, 1988

M.B.A., University of Miami, 1990

Ph.D., The University of Texas at Austin, 2000

ASSOCIATED ACCOUNTING ACTIVITIES: Editor, *Auditing: A Journal of Practice & Theory*, 2017–2020; Editor, *Current Issues in Auditing*, 2017–2020; Editor, *Issues in Accounting Education*, 2012–2015; Editorial Board, *Contemporary Accounting Research*, 2017–2024; Editorial Board, *Behavioral Research in Accounting*, 2011–2024.

SELECTED PUBLICATIONS: The Effects of Audit Committee Ties and Industry Expertise on Investor Judgments—Extending Source Credibility Theory, with Jeff Cohen, Ganesh Krishnamoorthy, and Arnie Wright, *Accounting, Organizations & Society*, 102, 2022; The Effect of Audit Guidance on Auditors' Evaluations of Fair Value Estimates, with Jeff Cohen, Norma Montague, Julie Wayne, and C. Alves, *Auditing: A Journal of Practice & Theory*, 41 (4): 85–105, 2022; Can Customized Procedure Descriptions Communicate Information Credibility? Conflicting Nonfinancial Assurance Standards, with S. Vera-Munoz and William Kinney, Jr., *Auditing: A Journal of Practice & Theory*, 39 (4): 201–222, 2020; Understanding the Relationship between Financial Reporting Quality and Audit Quality, with Andrea Kelton, Molly Mercer, and Teri Yohn, *Auditing: A Journal of Practice & Theory*, 35 (4): 1–22, 2016; The Effects of Analyst Forecasts and Management Forecast Consistency on Perceptions of Management Forecast Credibility, with Andrea Kelton, *Accounting and Finance*, 54: 189–210, 2014; The Audit of Fair Values and Other Estimates: The Effects of Underlying Environmental, Task, and Auditor-Specific Factors with Brian Bratten, Linda McDaniel, Norma Montague, and Greg Sierra, *Auditing: A Journal of Practice & Theory*, 32 (Supplement 1): 7–44, 2013; The Impact On Auditor Judgments of CEO Influence on Audit Committee Independence, with Jeff Cohen, Ganesh Krishnamoorthy, and Arnie Wright, *Auditing: A Journal of Practice & Theory*, 30 (4): 129–148, 2011; Fair Value Accounting for Liabilities: The Role of Disclosures in Unraveling the Counterintuitive Income Statement Effect from Credit Risk Changes, with Linda McDaniel and Teri Yohn, *Accounting, Organizations, and Society*, 36 (3): 125–134, 2011; The Incremental Benefits of a Forensic Accounting Course on Skepticism and Fraud-Related Judgments, with Tina Carpenter and Cindy Durtschi, *Issues in Accounting Education*, 26 (1): 2–21, 2011; Auditor Communications with the Audit Committee and the Board of Directors: Policy Recommendations and Opportunities for Future Research, with Jeff Cohen, Ganesh Krishnamoorthy, and Arnie Wright, *Accounting Horizons*, 21 (2): 165–187, 2007; The Effects of Joint Provision and Disclosure of Non-Audit Services on Audit Committee Members' Decisions and Investor Preferences, with Linda McDaniel and Terry Neal, *The Accounting Review*, 81 (4): 873–896, 2006.

RESEARCH INTERESTS: Fair Values; Audit Committee Decisions; Auditor Independence; Fraud Detection and Reporting; Disclosure Effects.



The University of Texas at Austin

**Nicholas J. Hallman (Nick)**

DEGREES: B.A., Appalachian State University, 2009

M.A., Appalachian State University, 2009

Ph.D., University of Missouri, 2016

ASSOCIATED ACCOUNTING ACTIVITIES: Auditor at Deloitte, 2008–2012; *Contemporary Accounting Research* Editorial Board, 2023–Present); *The Accounting Review* Editorial Board, 2021–Present; *Auditing: A Journal of Practice & Theory* Editorial Board, 2017–Present; Senior Scholar at the Salem Center for Policy, 2023–Present.

SELECTED PUBLICATIONS: How Do Auditors Respond to Competition? Evidence From the Bidding Process, with Antonis Kartapanis and Jaime Schmidt, *Journal of Accounting and Economics*, 2022; Audit Implications of Non-GAAP Reporting, with Anne Thompson and Jaime Schmidt, *Journal of Accounting Research*, 2022; Does Distance Matter? An Investigation of Partners Who Audit Distant Clients and the Effects on Audit Quality, with Jere Francis and Nargess Golshan, *Contemporary Accounting Research*, 2022; A Matter of Appearances: How Does Auditing Expertise Benefit Audit Committees When Selecting Auditors? with Matthew Baugh and Steven Kachelmeier, *Contemporary Accounting Research*, 2022; The Geographic Decentralization of Audit Firms and Audit Quality, with Matthew Beck and Joshua Gunn, *Journal of Accounting and Economics*, 2019.

RESEARCH INTERESTS: Auditing.



Franklin University

**Tracie Miller**

DEGREES: B.S., Texas A&M University, 2001

M.S.Acc., Texas A&M University, 2001

Ph.D., Texas A&M University, 2022

ASSOCIATED ACCOUNTING ACTIVITIES: Program Chair, Franklin University, 2023–Present; President, Teachers of Accounting at Two Year College, 2020–Present; Board Member, Texas Society of CPAs (TXCPA), 2024; Board Member, TXCPA Accounting Education Foundation, 2020–Present; President, TXCPA Austin Chapter, 2022–2023; J. Michael and Mary Anne Cook/Deloitte Foundation Prize Winner, 2015; Chair, AICPA Pre-Certification Education Executive Committee, 2013.

SELECTED PUBLICATIONS: *Horngrén's Accounting*, with B. Mattison, 2024; *Horngrén's Financial and Managerial Accounting*, with B. Mattison, 2024; Teaching the ETL Process, with W. Tietz and J. Cainas, *Strategic Finance*, 2022; Excel: The Common Denominator, with W. Tietz and J. Cainas, *Strategic Finance*, 2021; KAT Insurance: Data Analytics Cases for Introductory Accounting Using Excel, Power BI and/or Tableau, with W. Tietz and J. Cainas, *Journal of Emerging Technologies in Accounting*, 2021; The Bots are Coming...In Intro Accounting, with W. Tietz and J. Cainas, *Strategic Finance*, 2020.

RESEARCH INTEREST: Accounting Education.





University of Miami

**Miguel A. Minutti-Meza**

DEGREES: Ph.D., University of Toronto, 2011

ASSOCIATED ACCOUNTING ACTIVITIES: Editor, *Review of Accounting Studies*, 2023–Present; Associate Editor, *Journal of Accounting Research*, 2021–Present; Editor, *Contemporary Accounting Research*, 2017–2023; Editorial Board Member, *Auditing: A Journal of Practice & Theory*, 2014–Present; Editorial Board Member, *The Journal of Financial Research*, 2022–Present; Auditing Coordinator for AAA-Financial Accounting and Reporting Section 2018 Midyear Conference; Auditing Program Committee for 2019 AAA Annual Meeting; Auditing Co-director Program Committee for 2020 AAA Annual Meeting.

SELECTED PUBLICATIONS: Can Big 4 Versus Non-Big 4 Differences in Audit-Quality Proxies be Attributed to Client Characteristics? with Alastair Lawrence and Ping Zhang, *The Accounting Review*, 86 (1): 259–286, 2011; Does Auditor Industry Specialization Improve Audit Quality? with Elizabeth Gutierrez, Kay W. Tatum, and Maria Vulcheva, *Journal of Accounting Research*, 51 (4): 779–817, 2013; Consequences of Adopting an Expanded Auditor’s Report in the United Kingdom, *Review of Accounting Studies*, 23 (4): 1543–1587, 2018.

RESEARCH INTERESTS: Capital Markets, especially in Auditing, Financial Reporting, and Methodology Issues.



Babson College

**Brigitte W. Muehlmann**

DEGREES: Ph.D., WU Vienna University of Economics and Business, 1995

M.S.T., Bentley University, 2000

ASSOCIATED ACCOUNTING ACTIVITIES: CreditRiskMonitor.com (CRMZ), Board of Directors, Chair of Audit Committee, 2023–Present; PwC, Global Tax Services, Senior Manager and Manager, 1996–1999; EY, Entrepreneurial Services, Audit, Tax, and Forensic Accounting, 1989–1996.

AMERICAN ACCOUNTING ASSOCIATION: Editorial Boards: *Journal of Emerging Technologies in Accounting (JETA)*, 2015–2020 and 2023–Present; *ATA Journal of Legal Tax Research (JLTR)*, 2012–2014 and 2018–Present; Editorial Advisory Board: *Journal of Emerging Technologies in Accounting (JETA)*, 2020–2023; Nominations Committee, 2022–2023; Council Member, 2018–2021; Cook Prize Nominator, 2017–2019, 2021–2022, and 2024; Innovation in Accounting Education Award Committee, 2018–2019; Doctoral Consortium Committee, 2013–2014; Distinguished and Notable Literature Awards Committee, 2012–2014 and 2019–2020. Strategic Emerging Technologies Section (SET): Executive Committee, 2010–2015, President 2013–2014; Nominations Committee, 2014–2015 and 2023–2024; Design Science Research Workshops in Accounting (DRAW1, 2 and 3), Creator, 2012–2015. American Taxation Association (ATA): Legal Research Committee, 2019–2025; Long-Range Planning Committee, Chair, 2017–2018 and 2022–2023; Treasurer, 2015–2017; Membership Committee, Chair, 2014–2015; Trustee, 2012–2014; Publications Committee, 2012–2014. International Accounting Section (IAS): Annual Meeting, Co-coordinator, 2010–2021; IAS Educator of the Year Committee, 2019–2020. Diversity Section: Northeast Coordinator, 2012–2021. Forensic Accounting Section (FAS): Nominations Committee, 2013–2014; Tax Fraud/Underground Economy Committee, 2010–2017; Bylaw Review/Strategic Planning Committee, Member, 2010–2011.

PROFESSIONAL: Babson College: Professor, 2016–Present; Associate Professor, 2014–2016; Chair of the Accounting & Law Division, 2016–2018. Suffolk University, Associate Professor, 2007–2014. Bentley University, Associate Professor, 2000–2007.

SELECTED PUBLICATIONS: Technology Agility Supported by a Growth Mindset: A New Requirement for Accounting Curricula, with Qi Liu, Amelia Baldwin, and Victoria Chiu, *Journal of Emerging Technologies in Accounting*, 20 (2), 11–28, 2023; Bringing Scholarly Data Analytics Knowledge Using Emerging Technology Tools in Accounting into Classrooms: A Bibliometric Approach, with Qi Liu, Victoria Chiu, and Amelia Baldwin, *Issues in Accounting Education*, 36 (4), 153–181, 2021; A Bibliometric Analysis of Accounting Information Systems Journals and Their Emerging Technologies Contributions, with Victoria Chiu, Qi Liu, and Amelia Baldwin, *International Journal of Accounting Information Systems*, 32, 24–43, 2019; Case: The Accountant and the Error of His Ways, with Virginia Soybel and Robert Turner, *Journal of Forensic and Investigative Accounting*, 10 (2), 287–293, 2018; Emerging Technologies Research in Accounting: *JETA's* First Decade, (A Bibliometric Analysis), with Victoria Chiu and Qi Liu, *Journal of Emerging Technologies in Accounting*, 12, 17–50, 2015; The Role of Special Masters in Federal Tax Cases, with Priscilla Burnaby, *Journal of Forensic and Investigative Accounting*, 7 (2), 1–30, July-December 2015; Summary Witness Testimony in Tax Litigation Cases, with Priscilla Burnaby and Martha Howe, *Journal of Forensic and Investigative Accounting*, 5 (1), 1–34, January-June 2013; The Use of Forensic Accounting Experts in Tax Cases as Identified in Court Opinions, with Priscilla Burnaby and Martha Howe, *Journal of Forensic and Investigative Accounting*, 4 (2), 1–34, July-December 2012; Income from Student Inventions and the Kiddie Tax, with Wannya Baez and Priscilla Burnaby, *ATA Journal of Legal Tax Research*, 10 (2), 1–13, July-December 2012; The Travels of a T-shirt in the World of Taxation: Teaching Multi-Jurisdictional Taxation, with Priscilla Burnaby, *Issues in Accounting Education*, 26 (1), 67–86, February 2011.

RESEARCH INTERESTS: Innovation in Accounting and Taxation; Emerging Technologies; Sustainability.



Michigan State University

**Michelle L. Nessa**

DEGREES: B.S.B.A., Drake University, 2006

M.S., Taxation, DePaul University, 2008

Ph.D., The University of Iowa, 2014

ASSOCIATED ACCOUNTING ACTIVITIES: Editorial Review Board Member, *The Accounting Review*, 2021–Present; Editorial Review Board Member, *Journal of the American Taxation Association*, 2020–2023; American Taxation Association Trustee, 2023–Present.

SELECTED PUBLICATIONS: The Use of Financial Accounting Information in the OECD BEPS 2.0 Project: A Discussion of the Rules and Concerns, with Michelle Hanlon, *National Tax Journal*, 76 (1): 193–232, 2023; Law Firms as Tax Planning Service Providers, with Andrew Acito, *The Accounting Review*, 97 (4): 1–26, 2022; How Do Reductions in Foreign Country Corporate Tax Rates Affect U.S. Domestic Manufacturing Firms? with Jaewoo Kim and Ryan Wilson, *The Accounting Review*, 96 (3): 287–311, 2021; How Do IRS Resources Affect the Corporate Audit Process? with Casey Schwab, Bridget Stomberg, and Erin Towery, *The Accounting Review*, 95 (2): 311–338, 2020; Does FIN 48 Improve Firms' Estimates of Tax Reserves? with Cristi Gleason and Lillian Mills, *Contemporary Accounting Research*, 35 (3): 1395–1429, 2018; Repatriation Tax Costs and U.S. Multinational Companies' Shareholder Payouts, *The Accounting Review*, 92 (4): 217–241, 2017.

RESEARCH INTERESTS: Taxation of Multinational Companies; Tax Enforcement; Effects of Tax and Financial Reporting on Firm Decisions.



University of Southern California

**Daniel E. O'Leary (Dan)**

DEGREES: Ph.D., Case Western Reserve University, 1986

ASSOCIATED ACADEMIC ACTIVITIES: Fulbright Research Scholar in France, 2021–2022; Elected as a Senior Member of the Association for the Advancement of Artificial Intelligence (AAAI), January 2023; Founder and President of Special Interest Group for Artificial Intelligence and Autonomous Systems, for the Association for Information Systems, 2017; Member of Roughly 70 Ph.D. Dissertation Committees, to-date.

EDITORIAL: *The Accounting Review* (Accounting Information Systems) 2023–Present; Editor, *IEEE Intelligent Systems*, 1997–2001; Founder (1992) and Editor, *Intelligent Systems in Accounting, Finance and Management*; Editor, *Journal of Emerging Technologies in Accounting* (AAA), 2009–2011; Editor, *Journal of Organizational Computing and Electronic Commerce*, 2019–2021; Selected Current Editorial Boards, *Enterprise Information Systems* (Associate Editor), *Expert Systems with Applications*, *Expert Systems: The Journal of Knowledge Engineering*, *IEEE Intelligent Systems*, *International Journal of Accounting Information Systems*; *Information Systems and E-Business Management* (Senior Editor); *Journal of Emerging Technologies in Accounting*, (AAA); *Journal of Information Systems* (AAA); *Knowledge and Information Systems*.

SELECTED RECENT PUBLICATIONS: Large Language Models: The Rebirth of Knowledge Management and the Rise of Prompt Libraries, *IEEE Intelligent Systems*; The Rise and Design of Enterprise Large Language Models, *IEEE Intelligent Systems*; An Analysis of Watson Vs. BARD Vs. ChatGPT: The Jeopardy Challenge, AAAI's *AI Magazine*; The ChatGPT Artificial Intelligence Chatbot: How Well Does It Answer Accounting Assessment Questions? with David Wood and others, *Issues in Accounting Education*; Text Analysis of Evolving Emotions and Sentiments in COVID-19 Twitter Communication, *Cognitive Computation*, with Veda Storey, Available on the NIH web site for the National Library of Medicine, <https://pubmed.ncbi.nlm.nih.gov/35915743/>; V-Matrix: A Wave Theory of Value Creation for Big Data and Analytics, with Guido Geerts, *International Journal of Accounting Information Systems*; Blockchain: Trouble in the Enterprise? *International Conference on Information Systems (ICIS)*; Using Machine Learning to Generate a Dictionary for Environmental Issues, with Ben Yoon, In

*International Cross-Domain Conference for Machine Learning and Knowledge Extraction*.

RESEARCH INTERESTS: Artificial Intelligence; Large Language Models; Text Mining; Ontologies; Blockchain; Prediction Markets; Emerging Technologies.



University of Michigan

**Catherine Shakespeare (Cathy)**

DEGREES: B.A., Dublin City University, 1990

F.C.A., Institute of Chartered Accountants Ireland, 1993

Ph.D., University of Illinois Urbana, Champaign, 2002

SELECTED PUBLICATIONS: What Can We Learn From Debt Valuation Adjustments? with Argyro Panaretou, Wen Lin, and Grzegorz Pawlina, *Review of Accounting Studies*, 2022; The Accounting Consequences of Non-Accounting Regulation: Evidence from the Announcement of Basel III, with Bradley E. Hendricks, Jed J. Nelson, and Christopher Williams, *The Accounting Review*, 98 (1): January 2023; Reporting Matters: The Real Effects of Financial Reporting, with Ryan McDonough and Argyro Panaretou, *Accounting and Business Research*, 2020; Fair Value Accounting: Current Practice and Perspectives for Future Research, with Ryan McDonough, *Journal of Business Finance and Accounting*, 47 (3–4): 303–332, 2020; Fair Value Measurement Capabilities, Disclosure, and the Perceived Reliability of Fair Value Estimates: A Discussion of Bhat and Ryan, *Accounting Organizations and Society*, 46, 96–99, October 2015.

RESEARCH INTERESTS: Measurement Systems, Financial Instruments, Fair Value Accounting.



University of Arkansas

**Jonathan Shipman**

DEGREES: B.S., University of Central Arkansas, 2003

Ph.D., The University of Tennessee, 2014

ASSOCIATED ACCOUNTING ACTIVITIES: Editor, *The Accounting Review*, 2023–Present; Editor, *Contemporary Accounting Research*, 2023–2024; Editor, *Journal of Accounting, Auditing & Finance*, 2023–2024; Editorial Review Board, *The Accounting Review*, 2023; Editorial Review Board, *Contemporary Accounting Research*, 2020–2022; Editorial Review Board, *Auditing: A Journal of Practice & Theory*, 2017–Present; Editorial Review Board, *Journal of Accounting, Auditing & Finance*, 2022; AAA Audit Midyear Doctoral Consortium Chair (2025), Vice Chair (2024), and Faculty Participant, (2017, 2021, 2023); Financial Accounting and Reporting Section Track Chair for 2022 AAA Annual Meeting; Contemporary Accounting Research Doctoral Consortium Faculty Participant, 2021; Auditing Section Liaison for 2019–2020 AAA Annual Meeting.

SELECTED PUBLICATIONS: Propensity Score Matching in Accounting Research, with Quinn Swanquist and Rob Whited, *The Accounting Review*, 92 (1), 213–244, 2017; Auditing Goodwill in the Post-Amortization Era: Challenges for Auditors, with Doug Ayres, Terry Neal, and Lauren Reid, *Contemporary Accounting Research*, 36 (1), 82–107, 2019; Auditor Independence and Fair Value Accounting: An Examination of Non-Audit Fees and Goodwill Impairments, with Joe Carcello, Terry Neal, and Lauren Reid, *Contemporary Accounting Research*, 37 (1), 189–217, 2020; Client Consulting Opportunities and the Reemergence of Big 4 Consulting Practices: Implications for the Audit Market, with Liz Cowle, Tyler Kleppe, and Robbie Moon, *The Accounting Review*, 97 (7), 135–168, 2022; Out of Control: The (Over) Use of Controls in Accounting Research, with Robbie Moon, Quinn Swanquist, and Rob Whited, *The Accounting Review*, 97 (3), 395–413, 2022.

RESEARCH INTERESTS: Auditing (Audit Regulation, Audit Competition, Auditor Independence, Audit Quality), Financial Accounting, Goodwill and Intangibles, Going Concern Reporting.





Brigham Young University

**Steven Smith (Steve)**

DEGREES: B.S., Brigham Young University, 1999

M.Acc., Brigham Young University, 1999

Ph.D., Cornell University, 2005

ASSOCIATED ACCOUNTING ACTIVITIES: Editorial Board, *Journal of Management Accounting Research*, 2016–2018; AAA Doctoral Consortium Committee, 2022–Present; MAS/IMA Teaching Case Conference Co-Director, 2018–2019; MAS Best Early Career Researcher Award Committee, 2018; IMA Committee on Academic Relations, 2013–2014.

SELECTED PUBLICATIONS: The Effects of Strategic Alignment and Strategic Clarity on Multidimensional Task Performance, with Tyler Thomas, *Accounting, Organizations and Society*, 2024; Difficult Cost Goals and Conflicting Honesty Incentives: The Influence of Decision Responsibility, with Theresa Libby and Chad Proell, *Journal of Management Accounting Research*, 2019; Reward Type and Performance: An Examination of Organizational Wellness Programs, with Bill Heninger and David Wood, *Management Accounting Research*, 2019; Managers' Discretionary Adjustments: The Influence of Uncontrollable Events and Compensation Interdependence, with Jasmijn Bol and Gary Hecht, *Contemporary Accounting Research*, 2015; Spillover Effects in Subjective Performance Evaluation: Bias and the Asymmetric Influence of Controllability, with Jasmijn Bol, *The Accounting Review*, 2011.

RESEARCH INTERESTS: Management Accounting; Control Systems; Performance Measurement; Incentives; Managerial Reporting.



Dartmouth College

**Phillip C. Stocken (Phil)**

DEGREES: B.Com., (Hons) (first class) University of the Witwatersrand, 1988

M.Com., University of the Witwatersrand, 1995

Ph.D., The Pennsylvania State University, 1998

ASSOCIATED ACCOUNTING ACTIVITIES: Co-Editor, *The Accounting Review*, 2011–2014; Ad hoc Editor, *The Accounting Review*, 2015–2017; Editorial Board, *The Accounting Review*, 2005–2011; Editorial Board, *Review of Accounting Studies*, 2003–2013; Editorial Board, *The Accounting Review*, 2014–Present; Selected Member of 2016–2017 Nominator Committee for the J. Michael and Mary Anne Cook Prize; Senior Invited Faculty, American Accounting Association New Faculty Consortium, 2016; Key Note Speaker, Financial Accounting and Reporting Section Doctoral Consortium, 2016; Several other American Accounting Association and Financial Accounting and Reporting Section Committees.

SELECTED PUBLICATIONS: A Model of Flops, with P. Hummel and J. Morgan, *RAND Journal of Economics*, 44, Winter 2013; Location of Decision-Rights within Multinational Firms, with L. A. Robinson, *Journal of Accounting of Research*; Location of Decision-Rights within Multinational Firms, with V. Laux, *Journal of Accounting of Research*, 51 (5), 1261–1297, December 2013; Managerial Reporting, Overoptimism, and Litigation Risk, with P. E. Fischer, *Journal of Accounting & Economics*, 53 (3), 577–591, June 2012; Analyst Information Acquisition and Communication, with J. Morgan, *The Accounting Review*, 85 (6), 1985–2009, November 2010; Information Aggregation in Polls, with J. Morgan, *American Economic Review*, 98 (3), 864–896, June 2008; Credibility of Management Forecasts, with J. L. Rogers, *The Accounting Review*, 80 (4), 1233–1260, October 2005; Imperfect Information and Credible Communication, with P. E. Fischer, *Journal of Accounting Research*, 39 (1), 119–134, June 2001; Credibility of Voluntary Disclosure. *RAND Journal of Economics*, 31 (2), 359–374, Summer 2000.

RESEARCH INTERESTS: Strategic Financial Reporting Behavior, Accounting Valuation Rules, Economics of Communication, Earnings Management.



University of South Florida

**Mark H. Taylor**

DEGREES: M.Acc., Brigham Young University, 1988

B.S., Brigham Young University, 1988

Ph.D., The University of Arizona, 1994

ASSOCIATED ACCOUNTING ACTIVITIES: President, American Accounting Association, 2023–2024; Vice-President, Finance, American Accounting Association, 2018–2020; President, AAA Auditing Section, 2013–2014; Academic Member, Auditing Standards Board, 2009–2012; Academic Fellow, US Securities Exchange Program, 2005–2006; Trustee and Audit Committee Chair, Northern Lights Fund Trust, Northern Light Fund Trust III, Grandeur Peaks Trust.

SELECTED PUBLICATIONS: Can Auditors Pursue Firm-Level Goals Nonconsciously on Audits of Complex Estimates? An Examination of the Joint Effects of Tone-at-the-Top Messaging and Management's Specialist, with Y. Wu and J. Pyzoha, *The Accounting Review*, November 2020; Mind the Gap: Why do Experts Disagree on the Sufficiency of Audit Evidence Supporting Fair Value Measurements and Complex Estimates? with S. Glover and Y. Wu, *Contemporary Accounting Research*, 2019; Current Practices and Challenges in Auditing Fair Value Measurements and Complex Estimates: Implications for Auditing Standards and the Academy, with S. Glover and Y. Wu, *Auditing: A Journal of Practice & Theory*, 2017; A Test of the Reliability Framework Using Lenders' Judgments, with T. DeZoort and T. Holt, *Accounting, Organizations & Society*, 2012; A Review of the Accounting Literature on Auditor Independence: Implications for Research and Policy, with G. Jenkins and A. Gramling, *Accounting Horizons*, 2010.

RESEARCH INTERESTS: Behavioral Auditing.



University of Florida

**Jennifer Tucker (Jenny)**

DEGREES: B.S., Beijing Institute of Technology, 1989

M.Acc. Science, University of Illinois, 1999

Ph.D., New York University, 2004

ASSOCIATED ACCOUNTING ACTIVITIES: Senior Editor, *Accounting Horizons*, June 2024–May 2027; Editor, *Contemporary Accounting Research*, 2020–2026; Editorial Review Board, *The Accounting Review*, 2010–Present; Editorial Review Board, *Review of Accounting Studies*, 2021–Present; AAA New Faculty Consortium Co-Chair, 2015; AAA FARS Best Dissertation Award Committee, 2008, 2012; AAA FARS Midyear Meeting Research Program Chair, 2013; AAA FARS Steering Committee, 2013–2015; AAA FARS Midyear Meeting Coordinator, 2025.

SELECTED PUBLICATIONS: Technological Peer Pressure and Skill Specificity of Job Postings, with Yi Cao, Shijun Cheng, and Chi Wan, *Contemporary Accounting Research*, 2023; Financial Statement Similarity, with Stephen V. Brown and Guang Ma, *Contemporary Accounting Research*, 2023; Technological Peer Pressure and Product Disclosure, with Sean Cao, Guang Ma, and Chi Wan, *The Accounting Review*, 2018; Within-Industry Timing of Earnings Warnings: Do Managers Herd? with Senyo Tse, *Review of Accounting Studies*, 2010; Selection Bias and Econometric Remedies in Accounting and Finance Research, *Journal of Accounting Literature*, 2010; Textual Analysis in Accounting: What's Next? with Khrystyna Bochkay, Stephen V. Brown, and Andy Leone, *Contemporary Accounting Research*, 2023.

RESEARCH INTERESTS: Financial Reporting; Voluntary Disclosure; The Role of Technology; Research Methodology.



Emory University

**Teri L. Yohn**

DEGREES: B.S., University of Delaware, 1986

Ph.D., Indiana University, 1991

ASSOCIATED ACCOUNTING ACTIVITIES: Editor, *The Accounting Review*, 2020–2023; Senior Editor, *Accounting Horizons*, 2015–2018; Editorial Board, *Review of Accounting Studies*, 2011–Present; Financial Accounting Standards Advisory Committee, 2018–2021.

SELECTED PUBLICATIONS: Measuring Portfolio Gains: The Case of Earnings Announcement Trading Signals, with Matthew Lyle, *The Accounting Review*, Forthcoming; Filling in the GAAPs in Individual Analysts' Street Earnings Forecasts, with Brian Bratten and Stephannie Larocque, *Management Science*, 2023; Blame Attribution and Disclosure Propensity, with Jason Schloetzer, Ayung Tseng, and Y. Yoon, *The Accounting Review*, 2021; Is All Disaggregation Good for Investors? Evidence from Earnings Announcements, with Eric Holzman, Nathan Marshall, and Joe Schroeder, *Review of Accounting Studies*, 2021; Analysts' Annual Earnings Forecasts and Changes to the I/B/E/S Database, with Andy Call, Max Hewitt, and Jessie Watkins, *Review of Accounting Studies*, 2021.

RESEARCH INTERESTS: Financial Statement Analysis; Voluntary Disclosure; Information Asymmetry; Equity Valuation; Stock Mispricing.

## AAA REPRESENTATIVE



**Yvonne Hinson, PhD, CPA** is the CEO of the American Accounting Association. Prior to assuming this role in September 2020, she served as the VP and Academic in Residence for the Association of International Certified Professional Accountants. She began her accounting career with Arthur Andersen in Charlotte, NC. After returning to The University of Tennessee to pursue her Ph.D., Yvonne accepted a position with Wake Forest University. During her over 18-year career at Wake Forest University she served as a faculty member, Director of Accountancy and Dean of Charlotte Programs. Yvonne has served on numerous academic and community committees and nonprofit Boards and is a past President of the Federation of Schools of Accountancy, past Chair of the AAA Membership Advisory Committee and past member of the Federal Government Cost Accounting Standards Board. She is currently a member of the PhD Project Board, the AACSB Board and the North Carolina Association of CPA's Board. Her research has been published in both academic and practitioner journals. She earned her BS in accounting and MBA from UNC-Charlotte.



## DELOITTE REPRESENTATIVES



Senior Manager, U.S. A&A Data Science Group, Deloitte

### **Kyle Baxter**

Kyle is a Senior Manager in the U.S. A&A Data Science Group, which develops AI services for applications used by A&A practitioners. Kyle directs development of the group's AI services, including generative model-based services for chat, information extraction, and review tasks. Kyle worked for 6 years in audit client service before joining the group. Prior to joining Deloitte, Kyle designed and developed iOS applications.



Senior Manager, National Office Audit & Assurance Services, Deloitte

### **Amy Boone**

Amy is Senior Manager in Deloitte's National Office Audit & Assurance Services with focus on Fraud, Risk Assessment, and Specialist subject matters. She works on methodology in these areas, including consultations and questions from audit engagement teams and development of audit tools and technologies, templates, and guides. Previously, she worked in the Carolinas practice serving clients in the Consumer and Industrial Products Industry. She received both her undergraduate and graduate degrees from Appalachian State University.



Senior Manager, Audit & Assurance, Deloitte

### **Aaron Brown**

Aaron is a Senior Manager in Deloitte's Audit & Assurance Practice in Dallas, focusing on serving public and private clients both in an audit and advisory capacity within the following industries: technology, energy and renewables, life sciences, and commercial business. Throughout his career, Aaron has worked on various accounting, auditing, and reporting matters.



Senior Manager, Deloitte Foundation

### **Kristy Chernick**

Kristy joined Deloitte in 1999 as a member of the firm's assurance practice. She has also worked in the organization's global offerings services group in London, England and served as a recruiting professional on Deloitte's talent acquisition team. Kristy currently serves as a senior manager with responsibility for faculty programs and various strategic, operational and compliance activities of the Deloitte Foundation.

Kristy has a Communications and Masters of Accounting degree from the University of Southern California. Kristy is currently a member of the American Accounting Association (AAA) and is a Certified Public Accountant in the State of California (inactive).

Manager, Deloitte Foundation

**Peg Levine**

Peg has over 20 years of experience with Deloitte and currently manages several Deloitte Foundation programs including the Deloitte Foundation Doctoral Fellowship program, Robert M. Trueblood Seminar for Professors, Tax Faculty Symposium, AAA/Deloitte Foundation/J. Michael Cook Doctoral Consortium, and the North Carolina A&T Center for Accounting Diversity Two-Year Bridge Symposium. Peg also acts as the Foundation liaison for facilitating the risk review of academic research requests submitted to Deloitte. Prior to joining the Foundation team in 2007, Peg was part of Deloitte's National Recruiting Technology team, the National Experienced Hire group, and the Marketplace Services group. Peg also acts as the Foundation liaison for facilitating the risk review of academic research requests submitted to Deloitte. Prior to joining the Foundation team in 2007, Peg was part of Deloitte's National Recruiting Technology team, the National Experienced Hire group, and the Marketplace Services group.

Peg received her Bachelor of Science from the University of Rhode Island and has over twenty-five years' experience in the field of Human Resources, Recruiting and Talent Management. She currently resides in Clayton, NC.

Senior Manager, Deloitte's National Office Accounting and Reporting Services

**Ragan Powell**

Ragan is a Senior Manager in Deloitte's National Office Accounting and Reporting Services practice, focusing on technical accounting issues related to Business Combinations, Financial Statement Presentation, SEC reporting requirements, and ESG. Prior to this role, he has over 8 years of experience in the Deloitte Audit practice, primarily serving public clients in the consumer industry. Throughout his career, Ragan has gained extensive experience serving both public and private clients regarding various accounting, auditing, and reporting matters.



Executive Director, Deloitte Foundation and Managing Director, Deloitte Services LP

**Kathleen E. Shoztic (Kathy)**

Kathy Shoztic leads the strategy and operations of the Deloitte Foundation, a U.S. education nonprofit that aims to accelerate equity, innovation, and excellence in education to help develop the next generation of business leaders. Kathy serves as a primary liaison between the academic community and Deloitte and leads many national programs and initiatives to help better prepare students for college and careers.

The Foundation provides critical financial support and skill-building opportunities in business, accounting, and STEM for high school and college students and students ages 16–24 pursuing other learning pathways. Working with academic leaders, the Foundation helps drive education innovation through development programs and curriculum for the classroom that simulate real-world scenarios. To help prepare today's students for the jobs of tomorrow, the Foundation collaborates with academic institutions and nonprofit organizations that help build pathways to opportunity for the next generation.

Kathy also oversees the Foundation's Matching Gifts Program which, coupled with contributions from Deloitte professionals, has provided more than \$38M in matching funds over the past five years to more than 500 U.S. colleges and universities.

She is currently a member of the American Accounting Association (AAA), AAA Trueblood Seminars Committee and the Pace University Alumnae Engagement Committee. She is a past recipient of the Federation of Schools of Accountancy (FSA) Practitioner Service Award in recognition of her contributions and service to the accounting academic community, and has served on numerous boards and committees of the AAA, AICPA, FSA and the Pathways Commission.

Kathy received her B.B.A. in Accounting and M.B.A. from Pace University, and worked in higher education prior to beginning her career with Deloitte.





**Qi An**

University of Alberta

DEGREES: B.A., Nanjing University, 2013

M.A., Nanjing University, 2016

M.A., Binghamton University, SUNY, 2020

RESEARCH INTERESTS: Voluntary Disclosure, Political Economics

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Ke Wang



**Will Anding**

Florida State University

DEGREES: B.A., Mississippi State University, 2016

M.P.A., Mississippi State University, 2017

RESEARCH INTERESTS: Audit Quality, Accounting Standards, XBRL

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Nate Newton; Ally Zimmerman; Zahn Bozanic



**Jose N. Arguello (Nico)**

The University of Tennessee

DEGREES: A.A., Collin County Community College, 2012

B.B.A., Southern Methodist University, 2014

M.S., Southern Methodist University, 2016

RESEARCH INTERESTS: Audit and Corporate Governance

DOCTORAL FIELD(S): Auditing

FACULTY ADVISOR(S): Linda Myers; James Myers; Justin Short



**Luke Barnhart**

University of Massachusetts Amherst

DEGREES: B.S., The University of Alabama, 2020

RESEARCH INTERESTS: Sustainability Disclosure, Investor Behavior, Auditor Judgments

DOCTORAL FIELD(S): Financial Accounting, Auditing

FACULTY ADVISOR(S): Elaine Wang; Chris Agoglia; Dave Piercey



**Austin Blake**

Arizona State University

DEGREES: B.A., The University of Maine, 2018

M.B.A., The University of Maine, 2019

RESEARCH INTERESTS: Multi-Jurisdictional Taxation, Tax Policy, Tax Enforcement

DOCTORAL FIELD(S): Accounting, Tax

FACULTY ADVISOR(S): Jennifer Brown; David Kenchington; Mary Cowx





**Rebekha Bokrand (Becky)**

Texas Tech University

DEGREES: M.S., Florida Gulf Coast University, 2002

C.P.A., Florida, 2004

C.F.E., Association of Certified Fraud Examiners, 2007

C.F.F., American Institute of CPAs, 2008

RESEARCH INTERESTS: Audit and Forensic Accounting Specialization, Disclosure of Audit Information and Processes

DOCTORAL FIELD(S): Audit, Forensic Accounting

FACULTY ADVISOR(S): G. Ryan Huston; Heather Carrasco



**Adam Bross**

Washington State University

DEGREES: B.A., The Ohio State University, 2017

C.P.A., Accountancy Board of Ohio, 2018

RESEARCH INTERESTS: Employee Performance, Client Interactions, and Organizational Controls

DOCTORAL FIELD(S): Management Accounting

FACULTY ADVISOR(S): Ryan Sommerfeldt; Brett Campbell



**Brett Campbell**

Yale University

DEGREES: B.S., Brigham Young University, 2020

M.Acc., Brigham Young University, 2020

M.A. Yale University, 2023

M.Phil., Yale University, 2023

RESEARCH INTERESTS: Social Media, Disclosure Processing Costs, Information Content of Earnings, Earnings Management

DOCTORAL FIELD(S): Accounting, Financial Accounting

FACULTY ADVISOR(S): Jake Thomas



**Aodhdin Casey**

Maynooth University

DEGREES: F.C.A., Chartered Accountants Ireland, 1996

RESEARCH INTERESTS: Business Models, Small and Medium Accountancy Practices, Professional Services Firms

DOCTORAL FIELD(S): Organizational Behavior

FACULTY ADVISOR(S): Ruth Mattimoe; Bríd Murphy; Joan Ballantine



**Benjamin Chapin (Ben)**

Virginia Commonwealth University

DEGREES: B.S., Virginia Polytechnic Institute and State University, 2008

RESEARCH INTERESTS: Management Controls, Incentives, and Feedback Artificial Intelligence (Behavioral) Creativity and Emotion

DOCTORAL FIELD(S): Management Accounting

FACULTY ADVISOR(S): Bernhardt Reichert



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Drexel University

DEGREES: B.S., Binghamton University, SUNY, 2011

M.S., Binghamton University, SUNY, 2012

RESEARCH INTERESTS: Sustainability, Management Accounting

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Curtis Hall



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University of Miami

DEGREES: B.A., Ewha Women's University, 2015

M.A., Ewha Women's University, 2017

RESEARCH INTERESTS: Sustainability, ESG, Financial Reporting

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Khrystyna Bochkay; Mark Maffett



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University of Pennsylvania

DEGREES: B.B.A., College of William & Mary, 2016

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C.P.A., Virginia Board of Accountancy, 2018

RESEARCH INTERESTS: Financial Reporting and Capital Raising

DOCTORAL FIELD(S): Accounting

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University of North Texas

DEGREES: B.B.A., East Tennessee State University, 2010

M.Acc., East Tennessee State University, 2011

RESEARCH INTERESTS: Auditor Liability, Audit Judgment and Decision-Making

DOCTORAL FIELD(S): Auditing, Management Accounting

FACULTY ADVISOR(S): Jesse C. Robertson



**Rebecca Crouse (Becky)**

The University of Oklahoma

DEGREES: B.B.A., The University of South Dakota, 2012

M.P.A., The University of South Dakota, 2012

RESEARCH INTERESTS: Corporate and Noncorporate Tax, Transparency in Accounting and Tax, Financial Institutions

DOCTORAL FIELD(S): Tax, Capital Markets

FACULTY ADVISOR(S): Bradley Blaylock



**Katie Daugherty**

Indiana University

DEGREES: B.B.A., University of Georgia, 2014

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RESEARCH INTERESTS: Corporate Tax Planning, Financial Reporting for Taxes, Tax Policy and Regulation

DOCTORAL FIELD(S): Tax

FACULTY ADVISOR(S): Bridget Stomberg



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University of Pittsburgh

DEGREES: B.S., Wake Forest University, 2019

M.S., Wake Forest University, 2020

RESEARCH INTERESTS: Corporate Voluntary Disclosure, Financial Reporting, Executive Compensation

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Mei Feng; Mark (Shuai) Ma



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The University of Texas at Austin

DEGREES: B.S.B.A., Auburn University, 2016

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RESEARCH INTERESTS: Auditor Competition, Audit Regulation, Securities Regulation

DOCTORAL FIELD(S): Accounting, Auditing

FACULTY ADVISOR(S): Nicholas Hallman



**Matthew Evans**

The University of Alabama

DEGREES: A.B.J., University of Georgia, 2007

M.A., University of Phoenix, 2011

B.A., LaGrange College, 2018

RESEARCH INTERESTS: Financial Reporting Sustainability Capital Markets

DOCTORAL FIELD(S): Financial Accounting, Management Accounting

FACULTY ADVISOR(S): Quinn Swannquist



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The University of Texas at San Antonio

DEGREES: B.A., The University of Toledo, 2006

M.B.A., Tiffin University, 2013

B.A., Tiffin University, 2020

M.S., University of Texas–Dallas, 2021

RESEARCH INTERESTS: Corporate Finance, Banking, Financial Reporting, Audit

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Jennifer Yin



**Andrew S. Glover**

University of Washington

DEGREES: B.S., Brigham Young University, 2017

M.S., Brigham Young University, 2017

RESEARCH INTERESTS: Capital Markets, Retail Investors, Market Regulation, Disclosure/Disclosure Response

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Ed deHaan; Elizabeth Blankespoor; Roberto Gonzalez



**Roberto Gonzales (Rob)**

The University of Texas at Arlington

DEGREES: M.S., University of North Texas, 2017

RESEARCH INTERESTS: Auditing, Corporate Governance, ESG

DOCTORAL FIELD(S): Auditing, Financial Accounting

FACULTY ADVISOR(S): Ramgopal Venkataraman; Nandu Nagarajan



**Heather Graham**

University of Michigan

DEGREES: B.B.A., Texas A&M University, 2020

M.F.M., Texas A&M University, 2020

RESEARCH INTERESTS: Securities Regulation & Enforcement, Disclosure, Capital Markets

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Gwen Yu; Chris Williams; Greg Miller



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Emory University

DEGREES: B.S., Brigham Young University, 2020

M.Acc., Brigham Young University, 2020

RESEARCH INTERESTS: Performance Measures, Incentives and Contracts, Manager Decision-Making

DOCTORAL FIELD(S): Management Accounting, Behavioral

FACULTY ADVISOR(S): Kristy Towry; Karen Sedatole; Karl Schuhmacher



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The University of British Columbia

DEGREES: B.A., Sichuan University, 2015

M.A., Boston College, 2017

RESEARCH INTERESTS: Financial Reporting, Earnings Conference Calls, Textual Analysis, Auditing

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Jenny Li Zhang; Kin Lo





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Duke University

DEGREES: B.S., Brigham Young University, 2020

M.Acc., Brigham Young University, 2020

RESEARCH INTERESTS: Financial Reporting, Executive Compensation, Shareholder Characteristics

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Scott Dyreng



**Grant E. Hayes**

University of Chicago

DEGREES: B.A., University of California, Berkeley, 2018

RESEARCH INTERESTS: Corporate Governance, ESG Reporting

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Abbie Smith; Hans Christensen



**Alex Helms**

Louisiana State University

DEGREES: B.S.B.A., Appalachian State University, 2013

M.Acc., Appalachian State University, 2016

RESEARCH INTERESTS: Sustainability, Corporate Finance, Disclosure Quality, Financial Reporting

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Ken Reichelt; Wei-Ling Song; Zhenhua Chen



**Allison S. Hickey**

University of Georgia

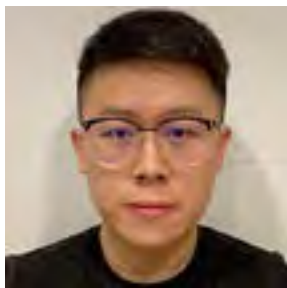
DEGREES: B.S., University of Virginia, 2014

M.S., American University, 2019

RESEARCH INTERESTS: Auditor Learning & Development, Identity, and Judgment & Decision-Making

DOCTORAL FIELD(S): Auditing, Behavioral

FACULTY ADVISOR(S): Jacqueline Hammersley; Frank Heflin



**Tao Hu**

Monash University

DEGREES: B.Sc., University of Birmingham, 2015

B.A., Wuhan University, 2015

M.Mgt., The University of Melbourne, 2017

B.Com. (Hons), Monash University, 2021

RESEARCH INTERESTS: Incentive Scheme, Performance Evaluation, Management Control System, Multitasking, Decision Making

DOCTORAL FIELD(S): Management Accounting

FACULTY ADVISOR(S): Kristian Rotaru; Dennis Fehrenbacher; John Ko



**Wan-Ci Huang (Rachel)**

National Cheng Kung University

DEGREES: B.A., National Cheng Kung University, 2019

M.A., National Cheng Kung University, 2020

RESEARCH INTERESTS: Managerial Characteristic; Taiwanese Regulations

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Hua-Wei Huang; Ting-Kai Chou



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The University of Iowa

DEGREES: B.B.A., Texas A&M University, 2020

M.S., Texas A&M University, 2020

RESEARCH INTERESTS: Corporate Governance, Regulation, Disclosure, Labor

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Paul Hribar; Dain Donelson



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York University

DEGREES: CPA CA, CPA Ontario, 1998

Specialist, CPA Canada, 2000

M.Ed., St. Francis Xavier University, 2013

RESEARCH INTERESTS: Ethics

DOCTORAL FIELD(S): Behavioral

FACULTY ADVISOR(S): Linda Thorne; Marcia Annisette; Theodore Noseworthy



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University of Southern California

DEGREES: B.B.A., Baylor University, 2016

M.A., Baylor University, 2016

RESEARCH INTERESTS: Financial Reporting, Corporate Tax Underpayment, Corporate Charitable Contributions

DOCTORAL FIELD(S): Financial Accounting, Corporate Tax

FACULTY ADVISOR(S): Patricia Dechow; Shane Heitzman



**Robert Monroe Jennings (Rob)**

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DEGREES: B.B.A./M.Acc., The University of Oklahoma, 2020

RESEARCH INTERESTS: Investors' Judgment and Decision-Making in Capital Markets, Standard Setting, ESG

DOCTORAL FIELD(S): Financial Accounting, Behavioral

FACULTY ADVISOR(S): Max Hewitt; Ben Van Landuyt; Jeremy Douthit



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Seoul National University

DEGREES: B.S., Bob Jones University, 2017

M.P.A., Clemson University, 2018

RESEARCH INTERESTS: Financial Reporting, Tax Avoidance, Corporate Governance

DOCTORAL FIELD(S): Financial Accounting, Corporate Tax Planning, Auditing

FACULTY ADVISOR(S): Sunhwa Choi



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Florida Atlantic University

DEGREES: B.A., Mansoura University, 2011

M.A., Mansoura University, 2015

RESEARCH INTERESTS: Voluntary Disclosure, Financial Reporting, Corporate Governance, Earnings Management

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Xiaohua Fang



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Massachusetts Institute of Technology

DEGREES: B.A., Seoul National University, 2018

M.S., Seoul National University, 2020

RESEARCH INTERESTS: Emerging Technologies, Investing (Capital Market)

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Eric So; Rodrigo Verdi; Andrew Sutherland



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Yonsei University

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RESEARCH INTERESTS: Tax, Auditing, Finance Accounting

DOCTORAL FIELD(S): Tax Accounting

FACULTY ADVISOR(S): Won-Wook Choi



**Jenny Kim**

University of Colorado Boulder

DEGREES: B.A., Sogang University, 2016

M.S., Seoul National University, 2020

RESEARCH INTERESTS: Corporate Governance, Disclosure

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Nathan Marshall; Andrea Pawliczek



**Oleksandr Kondrachuk**

University of Central Florida

DEGREES: M.D., Sumy State University, 2004

M.Sc., Sumy State University, 2005

M.Sc., Texas A&M University–Corpus Christi, 2020

RESEARCH INTERESTS: Judgment and Decision Making Around Artificial Intelligence

DOCTORAL FIELD(S): Management Accounting

FACULTY ADVISOR(S): Theresa Libby



**Alibek Korganbekov**

Boston University

DEGREES: B.A., Moscow State University, 2012

M.A., Higher School of Economics, 2014

M.A., Central European University, 2016

RESEARCH INTERESTS: Disclosure, Capital Markets, Emerging Technologies

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Peter Wysocki; Eddie Riedl; Francois Brochet



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University of Minnesota

DEGREES: B.A., Southwestern University of Finance and Economics, 2019

M.A., Chinese University of Hong Kong, 2021

RESEARCH INTERESTS: Information Intermediary, Behavioral Economics

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Joshua Madsen; Michael Iselin



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Columbia University

DEGREES: B.B.A., Tsinghua University, 2018

M.S., Columbia University, 2019

RESEARCH INTERESTS: Real Effects of Disclosure, Sustainability Reporting, Structural Estimation

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Thomas Bourveau; Matthias Breuer; Jonathan Glove



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University of California, Irvine

DEGREES: B.Sc., Northeastern University, 2015

M.Sc., Shanghai JiaoTong University, 2018

M.Sc., University of California, San Diego, 2019

RESEARCH INTERESTS: Emerging Technologies, Human Capital, Disclosure, Market Inefficiency

DOCTORAL FIELD(S): Financial Accounting, Information Systems

FACULTY ADVISOR(S): Ben Lourie; Terry Shevlin





**Samantha Liew**

University of Connecticut

DEGREES: B.S., Florida State University, 2018

M.A., Florida State University, 2019

CPA, 2019

RESEARCH INTERESTS: Real Effects of Taxation, Tax Policy

DOCTORAL FIELD(S): Tax

FACULTY ADVISOR(S): Francis Murphy; David Weber



**Yongzhao Lin (Vincent)**

Washington University in St. Louis

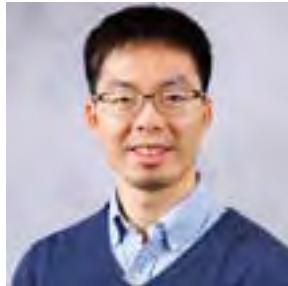
DEGREES: B.A., Beijing Foreign Studies University, 2017

M.A., Peking University, 2020

RESEARCH INTERESTS: Debt Contracting, Regulatory and Political Forces in Shaping Capital Market's Information Environment

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Xiumin Martin; Zachary Kaplan; John Barrios



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University of Illinois at Chicago

DEGREES: B.A., Xiamen University, 2007

Ph.D., Xiamen University, 2014

RESEARCH INTERESTS: Voluntary and Mandatory Disclosures, Financial Analysts, Financial Reporting

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Somnath Das; Andrew J. Leone; Rustam Zufarov



Carlos III University of Madrid

**Antonio Moreta**

DEGREES: M.Res., Carlos III University of Madrid, 2020

RESEARCH INTERESTS: Financial Reporting Regulation, Bank Debt Contracting, Financial Reporting Quality

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Juan Manuel García Lara; Beatriz García Osma; David Martínez-Miera



**Jessica Nysten**

University of Wisconsin–Madison

DEGREES: B.B.A., The University of Iowa, 2009

M.Ac., The University of Iowa, 2011

RESEARCH INTERESTS: Expanded Auditor Reporting

DOCTORAL FIELD(S): Auditing

FACULTY ADVISOR(S): Karla Zehms



**Matthew Oakes (Matt)**

The University of Mississippi

DEGREES: B.A., The University of Alabama, 2017

M.A., Louisiana Tech University, 2018

RESEARCH INTERESTS: Banking, Financial Reporting, Audit Archival

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Kendall Bowlin; Brett Cantrell



**Stephen M. Osowski**

Michigan State University

DEGREES: B.S.B.A., Marquette University, 2017

RESEARCH INTERESTS: Audit Committees, Expertise, Audit Partners, Auditor Selection/Contracting, Audit Quality, Fraud

DOCTORAL FIELD(S): Auditing

FACULTY ADVISOR(S): Ken Bills; Chris Hogan



**Hunter Pearson**

University of Oregon

DEGREES: B.B.A., Texas A&M University, 2020

M.S., Texas A&M University, 2020

RESEARCH INTERESTS: Disclosure, Strategic Disclosure, Peer Effects, Innovation

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Jaewoo Kim; Brady Twedt



**Xinyi Peng**

University of Calgary

DEGREES: B.A., University of Missouri–St. Louis, 2019

B.A., University of Missouri–St. Louis, 2019

M.P.Acc., Clemson University, 2020

RESEARCH INTERESTS: Financial Reporting

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Rong Zhao



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The University of Kansas

DEGREES: B.S., Truman State University, 2016

B.S., Truman State University, 2016

M.Acc., Drake University, 2018

RESEARCH INTERESTS: Capital Markets, Financial Reporting

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Adi Masli; Eric Weisbrod



**Anh Pham**

University of Kentucky

DEGREES: M.B.A., Texas A&M University–Corpus Christi, 2020

RESEARCH INTERESTS: Financial Analysts, Social Networks

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Brian Bratten; Dave Ziebart



**Sabrina Salome**

Virginia Polytechnic Institute and State University

DEGREES: B.S., The University of North Carolina at Wilmington, 2015

RESEARCH INTERESTS: Accounting/Audit Labor Market, Emerging Risks and Technologies, Corporate Governance

DOCTORAL FIELD(S): Auditing, Financial Accounting

FACULTY ADVISOR(S): Sarah Stein



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Jackson State University

DEGREES: B.A., Jackson State University, 2008

M.B.A., Jackson State University, 2009

RESEARCH INTERESTS: Behavioral Accounting, Accounting Education, Sustainability

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Bobbie Daniels; Lydia Didia; Nizar Alsharari



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The University of North Carolina at Chapel Hill

DEGREES: B.S., The University of North Carolina at Chapel Hill, 2004

M.B.A., North Carolina State University, 2018

RESEARCH INTERESTS: Managerial Accounting, Healthcare

DOCTORAL FIELD(S): Management Accounting, Cost Accounting

FACULTY ADVISOR(S): Eva Labro



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Texas A&M University

DEGREES: B.B.A., Texas A&M University, 2017

M.A., Texas A&M University, 2017

RESEARCH INTERESTS: Standard Setting, Regulation, Earnings Management

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Anwer Ahmed



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DEGREES: B.S., The University of North Carolina at Charlotte, 2017

M.Acc., The Ohio State University, 2018

RESEARCH INTERESTS: Audit Data Analytics, Audit Judgment and Decision-Making, Emerging Technologies

DOCTORAL FIELD(S): Behavioral, Auditing, Accounting Information Systems

FACULTY ADVISOR(S): Aaron Zimbelman



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University of Florida

DEGREES: B.A., University of Wisconsin–Madison, 2012

M.B.T., University of Southern California, 2014

M.B.A., University of California, Los Angeles, 2021

RESEARCH INTERESTS: Tax

DOCTORAL FIELD(S): Tax

FACULTY ADVISOR(S): Michael Mayberry



**Lulin Song**

University of Toronto

DEGREES: B.A., Central University of Finance and Economics, 2017

M.A., Peking University, 2020

RESEARCH INTERESTS: Emerging Technologies, Consumer Lending, Hospital Operation

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Scott Liao; Hai Lu



**Mengtian Sui (Tamara)**

Baruch College–CUNY

DEGREES: B.F.A., Parsons The New School, 2016

M.B.A., Baruch College–CUNY, 2020

M.Phil., Baruch College–CUNY, 2022

RESEARCH INTERESTS: Alternative Data, Artificial Intelligence Application in Corporate Disclosure, Emerging Technologies

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Edward Li; Brandon Lock; Monica Neamtiu



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ESSEC Business School

DEGREES: B.A., Shandong University, 2018

M.A., Peking University, 2020

RESEARCH INTERESTS: Credit Market, Information Processing Costs

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Daphne Lui; Robert Stoumbos





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Temple University

DEGREES: B.A., West Chester University, 2008

RESEARCH INTERESTS: Auditing, Goodwill, Intangibles, Corporate Culture

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Jagan Krishnan; Jayanthi Krishnan



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Harvard University

DEGREES: B.S., Massachusetts Institute of Technology, 2017

B.S., Massachusetts Institute of Technology, 2017

M.S., Boston College, 2020

RESEARCH INTERESTS: Share Repurchases, Share Repurchase Disclosure, Financial Reporting, ESG Reporting and Investment

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Charles Wang; V.G. Narayanan



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Rice University

DEGREES: B.R., Pontifical Catholic University of Peru, 2006

M.B.A., Central American Institute of Business Administration, INCAE, 2016

RESEARCH INTERESTS: Disclosure, Banking

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Karthik Balakrishnan



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University of Arkansas

DEGREES: B.S.B.A., Missouri Southern State University, 2015

M.Acc., Missouri Southern State University, 2016

RESEARCH INTERESTS: Tax Policy, Real Effects, Accounting for Income Taxes

DOCTORAL FIELD(S): Tax

FACULTY ADVISOR(S): Erin Henry



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DEGREES: B.S., Brigham Young University, 2007

M.S., The University of Texas at Austin, 2012

RESEARCH INTERESTS: Debt Contracting, Information Intermediaries

DOCTORAL FIELD(S): Accounting, Financial Accounting

FACULTY ADVISOR(S): Anne Beatty; Darren Roulstone



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DEGREES: B.S., National Chengchi University, 2013

M.A., Duke University, 2016

M.S., University of British Columbia, 2020

RESEARCH INTERESTS: Disclosure, Information Economics, Real Effect

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Atif Ellahie



**Lydia Wang**

Stanford University

DEGREES: A.B., Harvard University, 2020

RESEARCH INTERESTS: Digital Economy Innovation Executive Compensation Mergers and Acquisitions ESG

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Christopher Armstrong; Ron Kasznik



**Pei Wang**

University of Waterloo

DEGREES: B.Mgmt., University of International Business and Economics, 2012

M.M.P.A., University of Toronto, 2015

RESEARCH INTERESTS: Employee Training, Helping

DOCTORAL FIELD(S): Management Accounting

FACULTY ADVISOR(S): Adam Presslee



**Yao Wang**

Carnegie Mellon University

DEGREES: B.A., Renmin University of China, 2013

M.A., Renmin University of China, 2016

M.Phil., The Chinese University of Hong Kong, 2018

M.S., Carnegie Mellon University, 2022

RESEARCH INTERESTS: Sustainability, Disclosure, Corporate Governance

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Pierre Liang; Nicholas Muller



**Jiawen Yan**

Cornell University

DEGREES: B.S., Southwestern University of Finance and Economics, 2018

M.S., Columbia University, 2020

M.S., Tsinghua University, 2020

RESEARCH INTERESTS: Financial Reporting Social Conformity Information Processing Textual Analysis and Big Data

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Eric Yeung



**Jingwen Yang**

University of Maryland

DEGREES: M.A., University of Michigan, 2017

RESEARCH INTERESTS: Auditing, Voluntary Disclosures, Interaction of Accounting and Labor Economics

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Rebecca Hann; Michael Kimbrough



**Li Yang**

University of Illinois at Urbana-Champaign

DEGREES: B.A., Tsinghua University, 2014

M.P.A., The University of Texas at Austin, 2019

RESEARCH INTERESTS: Nonprofits and Social-Mission Organizations

DOCTORAL FIELD(S): Management Accounting

FACULTY ADVISOR(S): Laura Wang



**Yanru Yang**

Bentley University

DEGREES: B.A., Renmin University of China, 2012

M.S.A.A., Bentley University, 2020

RESEARCH INTERESTS: Audit Quality, Financial Reporting, Corporate Governance

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Gopal Krishnan



**Berk Yayvak**

The University of Texas at Dallas

DEGREES: B.S., Bilkent University, 2010

M.S., Bilkent University, 2013

RESEARCH INTERESTS: Corporate Disclosure, Macro-Accounting, Capital Markets

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Ashiq Ali; Stanimir Markov; Bugra Ozel



**Katherine (Kexin) Yu**

University of Cincinnati

DEGREES: B.B.A., Renmin University of China, 2015

M.S., Stony Brook University, SUNY, 2016

RESEARCH INTERESTS: Corporate Governance, Board of Directors, Internal Control, Debt Structure and Bond Covenant

DOCTORAL FIELD(S): Financial Accounting, Management Accounting, Auditing

FACULTY ADVISOR(S): Nan Zhou; Changjiang Wang; Jason Bangert



**Brian Yun**

University of Missouri

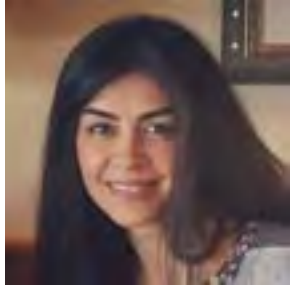
DEGREES: B.A., Sungkyunkwan University, 2018

M.A., Texas A&M, 2020

RESEARCH INTERESTS: Real Effects International Auditing

DOCTORAL FIELD(S): Financial Reporting

FACULTY ADVISOR(S): Inder Khurana



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The Pennsylvania State University

DEGREES: M.A., University of Houston, 2021

RESEARCH INTERESTS: Credit Rating

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Karl Muller; Sam Bonsall



**Zitong Zeng**

University of California, Los Angeles

DEGREES: B.B.A., University of Toronto, 2017

M.A., Columbia University, 2019

RESEARCH INTERESTS: Real Effects, Microstructure, Market Efficiency

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Henry Friedman



**Shuming Zhang**

New York University

DEGREES: B.B.A., The Chinese University of Hong Kong, 2018

M.A., Duke University, 2020

RESEARCH INTERESTS: Accounting Standards, Disclosure Regulations, Auditing

DOCTORAL FIELD(S): Financial Accounting, Auditing

FACULTY ADVISOR(S): Ilan Guttman; Xiaojing Meng; Xu Jiang



**Zhe Zhang (Joyce)**

McMaster University

DEGREES: B.A., University of International Relations, 2017

M.A., Southwestern University of Economics and Finance, 2019

RESEARCH INTERESTS: Financial Archival Research Including Voluntary Disclosure, Sustainability, Textual Analysis, Corporate Governance

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Alfred Liu





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Georgia Institute of Technology

DEGREES: B.S., University of Illinois at Urbana-Champaign, 2021

M.S., University of Illinois at Urbana-Champaign, 2022

RESEARCH INTERESTS: CSR, Emerging Technologies

DOCTORAL FIELD(S): Managerial Accounting

FACULTY ADVISOR(S): Jason Kuang



**Zhufang Zhao (Summer)**

University of California, Berkeley

DEGREES: B.A., Guangdong University of Foreign Studies, 2010

M.A., University of Georgia, 2011

M.A., University of California, Berkeley, 2021

RESEARCH INTERESTS: Voluntary Disclosures, Executive Compensation, Governance and Incentives, Textual Analysis

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Xiao-Jun Zhang



**Qiu Zheng (Autumn)**

West Virginia University

DEGREES: B.B.A., University of Wisconsin–Whitewater, 2017

RESEARCH INTERESTS: Corporate Finance Corporate Governance Innovation

DOCTORAL FIELD(S): Accounting

FACULTY ADVISOR(S): Jiwoo Ryou



**Yahui Zheng (Katie)**

University of Rochester

DEGREES: B.A.B.S., Bryant University, 2015

M.S., Bentley University, 2017

RESEARCH INTERESTS: Financial Reporting, Retail Investors, Insider Trading

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Joanna Wu



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DEGREES: B.A., University of Minnesota, 2010

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RESEARCH INTERESTS: Voluntary Disclosure, Capital Market, Financial Reporting, ESG, Corporate Governance, Agency Theory

DOCTORAL FIELD(S): Financial Accounting

FACULTY ADVISOR(S): Khondkar Karim; Jingrong Lin; Huimin Chen; Chi Zhang

# 2024 AAA/Deloitte Foundation/J. Michael Cook Doctoral Consortium

## Sunday, June 9, 2024

5:00 pm–5:15 pm

### Welcome and Introductions

Amphitheater

Carolyn M. Callahan, University of Louisville, and Chair, 2024 Doctoral Consortium Committee  
Kathy Shoztic, Executive Director, Deloitte Foundation  
Mark Taylor, AAA President, University of South Florida

5:15 pm–6:00 pm

### Breakout Group Introductions

(see group and room assignments)

6:00 pm–8:00 pm

### Private Dinner

Barry Salzberg Ballroom A

8:00 pm–10:00 pm

### Social Time

The Barn

## Monday, June 10, 2024

6:30 am–8:00 am

### Breakfast

The Market

8:00 am–8:20 am

### Break

8:20 am–8:30 am

### Session Logistics

Amphitheater

Carolyn M. Callahan, University of Louisville and Chair, 2024 Doctoral Consortium Committee

8:30 am–9:50 am

### Exemplar Talks

Amphitheater

*Accounting - 1.6 CH*

#### Financial Markets Research

Presenter: Jenny Tucker, University of Florida

#### Early Career

Presenter: Teri Yohn, Emory University

9:50 am–10:20 am

**Break**

10:20 am–11:20 am

**Work-Life Balance and Early Career**

Amphitheater

*Accounting - 1.2 CH*

Introductions: Carolyn M. Callahan, University of Louisville, and Chair, 2024 Doctoral Consortium Committee  
Nick Hallman, The University of Texas at Austin  
Michelle Nessa, Michigan State University

11:20 am–11:30 am

**Break**

11:30 am–12:30 pm

**Breakout Sessions**

(see group and room assignments)

*Accounting - 1.2 CH*

12:30 pm–1:30 pm

**Lunch**

The Market

1:30 pm–3:00 pm

**Breakout Sessions**

(see group and room assignments)

*Accounting - 1.8 CH*

3:00 pm–3:30 pm

**Break**

3:30 pm–4:30 pm

**Exemplar Talks**

Amphitheater

*Accounting - 1.2 CH*

**Audit Research**

Presenter: Jonathan Shipman, University of Arkansas

**Generative AI—Large Language Models**

Presenter: Dan O'Leary, University of Southern California

4:30 pm–4:45 pm

**Break**

4:45 pm–6:30 pm

**Faculty Interactions**

Westlake Hall AB and C (see sign up lists)

## Monday, June 10, 2024 (continued)

6:30 pm–7:30 pm

**Dinner**  
The Market

7:30 pm–9:30 pm

**Social Time**  
The Barn

## Tuesday, June 11, 2024

6:30 am–8:00 am

**Breakfast**  
The Market

8:00 am–9:00 am

**Breakout Sessions**  
(see group and room assignments)

*Accounting - 1.2 CH*

9:00 am–9:30 am

**Break**

9:30 am–10:30 am

**Teaching Exemplar Talk**  
Amphitheater

*Accounting - 1.2 CH*

Presenter: Cathy Shakespeare, University of Michigan

10:30 am–10:40 am

**Group Photo**  
Amphitheater

10:40 am–11:00 am

**Break**

11:00 am–12:00 pm

**Panel: J. Michael Cook Prize Winners**  
Amphitheater

*Accounting - 1.2 CH*

Lead: Bob Allen, Utah Valley University  
Panelists: Brigitte Muehlmann, Babson College  
George Gamble, University of Houston  
Tracie Miller, Franklin University



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12:00 pm–1:00 pm

**Lunch**  
The Market

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1:00 pm–2:00 pm

**Deloitte Practice Breakouts**  
(see sign up list)

*Accounting - 1.2 CH*

**Transformation/Generative AI**  
Presenter: Kyle Baxter, Deloitte

**SEC and FASB Regulation**  
Presenter: Ragan Powell, Deloitte

**Revenue Recognition**  
Presenters: Aaron Brown, Deloitte  
Amy Boone, Deloitte

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2:00 pm–2:30 pm

**Break**

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2:30 pm–3:20 pm

**Breakout Sessions**  
(see group and room assignments)

*Accounting - 1.0 CH*

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3:20 pm–3:30 pm

**Break**

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3:30 pm–4:30 pm

**Exemplar Talks**  
Amphitheater

*Accounting - 1.2 CH*

**Research to Inform Practice**  
Presenter: Khrystyna Bochkay, University of Miami

**Insights from Theoretical Research**  
Presenter: Phil Stocken, Dartmouth College

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4:30 pm–5:00 pm

**Break**

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5:00 pm–6:00 pm

**Breakout Sessions**  
(see group and room assignments)

*Accounting - 1.2 CH*

## Tuesday, June 11, 2024 (continued)

6:00 pm–6:30 pm

### Break

6:30 pm–7:30 pm

### Dinner

The Market

7:30 pm–9:30 pm

### Dessert Reception and Group Activity

Westlake Hall

9:30 pm–10:30 pm

### Social Time

The Barn

## Wednesday, June 12, 2024

6:30 am–8:00 am

### Breakfast

The Market

8:00 am–8:30 am

### Break

8:30 am–9:30 am

### Research Exemplar Talks

Amphitheater

*Accounting - 1.2 CH*

#### Managerial Accounting Research

Presenter: Susanna Gallani, Harvard University

#### Experimental Methods

Presenter: Jason Brown, Indiana University

#### Tax Research

Presenter: Jennifer Blouin, University of Pennsylvania

9:30 am–10:00 am

### Break

10:00 am–11:00 am

### Editor Perspective

Amphitheater

*Accounting - 1.2 CH*

Introductions: Carolyn M. Callahan, University of Louisville, and Chair, 2024 Doctoral Consortium Committee

John Campbell, *Review of Accounting Studies*

Miguel Minutti-Meza, *Journal of Accounting Research*

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11:00 am–12:00 pm

**Closing Comments**

Amphitheater

Teri Yohn, Emory University

Carolyn M. Callahan, University of Louisville and Chair, 2024 Doctoral Consortium Committee

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12:00 pm–1:30 pm

**Lunch (optional)**

The Market

**2024 Doctoral Consortium Small Group Session Assignments****Sunday, June 9—Breakout Group Introductions, 5:15 pm–6:00 pm****Monday, June 10—Breakout Sessions, 11:30 am–12:30 pm; 1:30 pm–3:00 pm****Tuesday, June 11—Breakout Sessions, 8:00 am–9:00 am; 2:30 pm–3:20 pm; 5:00 pm–6:00 pm****FINANCIAL REPORTING**Team Room 1064A  
**John Campbell**  
University of GeorgiaWill Anding  
Nico Arguello  
Becky Bokrand  
Heather Graham  
Christian Hutzler  
Sara Khaled  
David Kim  
Alibek Korganbekov**FINANCIAL REPORTING**Classroom 1067  
**Jenny Tucker**  
University of FloridaQi An  
Luke Barnhart  
Brett Campbell  
Seungju Choi  
Alex Coble  
Ciel Deng  
Matthew Evans  
Andrea Faulkner  
Andrew Glover**FINANCIAL REPORTING/REGULATION**Team Room 1064B  
**Khrystyna Bochkay**  
University of MiamiRongchen Li  
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Matt Oakes  
Xinyi Peng  
Matt Peterson  
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University of Arkansas  
**Nick Hallman**  
The University of Texas at AustinDorothy Dickmann  
Allison Hickey  
Patricia Jackson Farrell  
Jessica Nylan  
Stephen Osowski  
Sabrina Salome  
Colin Tipton  
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University of Pennsylvania  
**Michelle Nessa**  
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Becky Crouse  
Katie Daugherty  
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Dartmouth CollegeRob Gonzales  
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Mina Zarrin  
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**Susanna Gallani**  
Harvard UniversityAdam Bross  
Aodhdin Casey  
Ben Chapin  
Chunlin Chen  
Hayden Gunnell  
Emma Haithcock  
Michael Hu  
Rachel Huang  
Oleksandr Kondrachuk**MANAGERIAL/FINANCIAL REPORTING**Classroom 1070  
**George Gamble**  
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Alex Helms  
Ginger Scanlon  
Justin Walton  
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AMERICAN ACCOUNTING ASSOCIATION •  
DELOITTE FOUNDATION • J. MICHAEL COOK

# 2024 DOCTORAL CONSORTIUM

Westlake, Texas • June 9–12, 2024

## CPE CREDIT INSTRUCTIONS

### During the Consortium

To receive CPE Credit for the 2024 AAA/Deloitte Foundation/J. Michael Cook Doctoral Consortium you must **Check-In** and **Check-Out** of each session offering CPE credit (using the AAA APP).

### To Check-In and Check-Out using the AAA APP

- Click on the Agenda icon.
- Select the session you are attending.
- Locate the “Check In” Icon within the session and tap on it.
- You will be asked to enable your camera, choose “Allow”.
- Scan the QR code for this session.

**NOTE:** The “Check In” Icon will NOT appear until 30 minutes before the session begins and QR codes are different for each session.

**To receive CPE Credit you MUST **Check-In** AND **Check-Out** of each session offering CPE. “Check-In” is available 30 minutes before the session begins and you must sign in by start time. Please do not Check-Out earlier than the end time.**

At any time, you can return to the dashboard and tap on the “Sessions Scanned” icon to check your scans have been successfully completed.

### After the Consortium

To receive your Certificate of Completion for the Consortium, complete and submit the online CPE Verification Form at <https://aaahq.org/Meetings/2024/Doctoral-Consortium-CPE>

Questions can be directed to [cpe@aaahq.org](mailto:cpe@aaahq.org)

## EVALUATION FORM

The 2024 Doctoral Consortium Evaluation will be sent to you at the end of the Consortium. We appreciate your taking the time to fill out this evaluation and provide your feedback. The AAA studies the evaluations and the planning committee uses them in structuring the subsequent year’s Consortium. Your comments are particularly valuable to us. Thank you.

**American Accounting Association**

**AA/Deloitte Foundation/J. Michael Cook Doctoral Consortium Participant Request for Allowable Expense Reimbursement**

PLEASE PRINT PAYEE'S FULL NAME (FIRST, MIDDLE INITIAL, LAST)	TELEPHONE NUMBER MTG. DC
CLEARLY PRINT COMPLETE ADDRESS TO MAIL CHECK PAYEE'S ADDRESS (STREET, CITY, STATE, ZIP CODE)	

NOTE: The following expenses are ineligible for reimbursement:

- Car rental if the rental is not your primary mode of transportation to the Consortium.
- Car insurance purchased with a car rental.
- Car rent if the rental is above economy class.
- Baggage fees for travelers who were not invited to the Consortium.

**Choose reimbursement by mailed check:**  
Complete this form, sign, and return (including scanned receipts) to [beverly@aaaahq.org](mailto:beverly@aaaahq.org) to receive a check.

**Choose reimbursement by direct deposit (DD):**  
For a much quicker reimbursement you have the option of a Direct Deposit (DD) reimbursement. This option requires this form and the DD form completely filled out, signed, and returned with scanned receipts and a copy of a voided check.

DEPARTURE DATE:	6/9/2024	American Accounting Association/Deloitte Foundation/J. Michael Cook Doctoral Consortium
RETURN DATE:	6/12/2024	Deloitte University, 1 Deloitte Way, Westlake, Texas 76262

**TRANSPORTATION**

DATE	AIRFARE	BAGGAGE FEE (ONE BAG LIMIT)	TOLLS	CAR RENTAL (ECONOMY CLASS ONLY)	PARKING AT ORIGINATING AIRPORT	TAXI TO/FROM ORIGINATING AIRPORT	TRANSPORTATION SUBTOTAL
<b>TOTAL TRANSPORTATION</b> <sup>(930)</sup>							A

**MILEAGE (WITH MAP) OR GAS (WITH RECEIPTS)**

DATE	STARTING LOCATION	DESTINATION	MILEAGE (with map) OR GAS (with receipts)	MILEAGE RATE	MILEAGE OR GAS SUBTOTAL
				\$.67	
				\$.67	
<b>TOTAL MILEAGE OR GAS</b> <sup>(930)</sup>					B

PLEASE EMAIL ALL DOCUMENTATION (including scanned receipts) TO:

[BEVERLY@AAAHQ.ORG](mailto:BEVERLY@AAAHQ.ORG) by midnight on **JUNE 26**

**TOTAL EXPENSES** <sup>(A+B)</sup> DUE TO TRAVELER <sup>(930)</sup> \$ \_\_\_\_\_

TRAVELER'S NAME \_\_\_\_\_ TRAVELER'S SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_  
PLEASE PRINT

AUTHORIZER'S NAME **Beverly Collins** AUTHORIZOR'S SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

General Ledger Coding (AAA Use Only)

DC Travel	10	2520	65	930
Fund/Org Name	Fund (2)	Program (4)	Class (2)	Account (3)

FOR FINANCE USAGE ONLY:

EXPENSE APPROVAL
AP ENTRY
FINANCE REVIEW
CHECK SIGNER

9009 Town Center Parkway, Lakewood Ranch, FL 34202-4165  
P: 941.921.7747 | F: 941.923.4093  
E: info@aaahq.org



## Direct Deposit Authorization Form

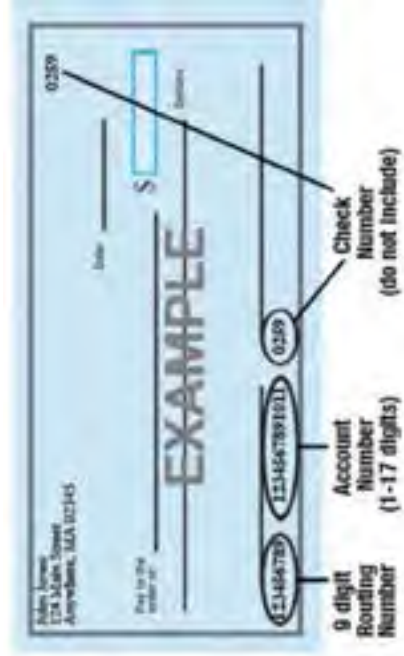
Please print and complete ALL the information below ONLY if you would like to receive your reimbursement by Direct Deposit.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Email Address: \_\_\_\_\_



Name of U.S. Bank: \_\_\_\_\_

Account # \_\_\_\_\_

9-Digit Routing #: \_\_\_\_\_

Please scan or mail this form along with a voided **check** to the American Accounting Association, Attention: Beverly Collins, [BEVERLY@AAAHQ.ORG](mailto:BEVERLY@AAAHQ.ORG) or 9009 Town Center Parkway, Lakewood Ranch, FL 34202. Request will not be honored without attaching a scanned voided check. If you have any questions, please email Beverly..

The American Accounting Association is hereby authorized to directly deposit my payment into the account listed above. This authorization will remain in effect until I modify or cancel it in writing.

Signature: \_\_\_\_\_ Print Name: \_\_\_\_\_ Date: \_\_\_\_\_