

JERRY D. MATHIS, PH.D., CPA

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Last Updated: February 2023

ACADEMIC EXPERIENCE

Washington University in St. Louis, Olin Business School

Postdoctoral Research Associate

July 2021 - Present

University of Michigan, Ross School of Business

Instructor

Fall 2017 & Summer 2020

EDUCATION

University of Michigan

Doctor of Philosophy, Accounting

Chair: Reuven Lehavy

2015 - 2021

Southern Methodist University

Master of Science, Business Analytics

Specialization in Business Process Analytics

2014 - 2015

University of Florida

Master of Accounting, Taxation

Bachelor of Science, Accounting

2009 - 2013

RESEARCH

Interests: Disclosure processing costs; Market microstructure; Managerial credibility; Political economy; Analyst forecasting; Financial accounting impacts of tax policy; Textual analysis

Working Papers

- [1] Do two wrongs make a right? Strategically forecasting EPS through inaccurate share forecasts (with Zachary Kaplan, Nathan Marshall, and Hanmeng Ivy Wang)
Under first-round review
- [2] Unearthing Firm Value: The Effect of Mandatory Sustainability Disclosures on Firm Information Environments (solo-authored)
Incorporating referee comments for submission in mid-2023
- [3] Giving away the 'secret sauce': Evidence on the consequences of actively managed ETF portfolio disclosures (with Todd Gormley, Zachary Kaplan and Jeremy Michels)
Preparing for submission in mid-2023
- [4] Selection Bias in Management Forecasting: Evidence from 8-K Filing Choices (solo-authored)
Currently revising previous draft

Works in Progress

- [1] When Harry Met SALY: The Effects of Earnings Persistence on Analysts' Information Processing (with Alyssa Hagerty and Reuven Lehavy)
Data analysis & hypothesis development stage
- [2] Raising The Bar: The Consequences of Corporate Minimum Taxes (with Alyssa Hagerty)
Data analysis & hypothesis development stage

- [3] Now That You Mention It: Analyst Forecast Revisions and Firms' Macroeconomic Narratives
(with Lindsey Gallo)
Currently revising previous draft

Early Stage Projects

- [1] Social Tone Dispersion (with Mailyn Fernandez)
Data collection stage
- [2] Just The Facts? Media Bias and Information Asymmetry (with Alyssa Hagerty)
Data collection stage
- [3] Do State Attorneys General Influence Firms' Misbehavior? (with John Kepler and Mihir Mehta)
Data collection stage
- [4] Comparability and Proprietary Costs (with Richard Frankel)
Data collection stage

TEACHING EXPERIENCE

Washington University in St. Louis

Federal Income Tax 1 (ACCT 467/567, 1 Online MAcc section)	<i>Scheduled - Summer 2023</i>
Financial Management (FIN 5203, 1 PMBA section)	<i>Scheduled - Summer 2023</i>
Principles of Managerial Accounting (ACCT 2620, 3 BSBA sections)	<i>Ongoing - Spring 2023</i>
Intermediate Financial Accounting I (ACCT 3610, 1 BSBA section)	<i>Ongoing - Spring 2023</i>
Intermediate Financial Accounting II (ACCT 3620, 1 BSBA section)	<i>Ongoing - Spring 2023</i>
Intermediate Financial Accounting I (ACCT 3610, 1 BSBA section, 23 students) Median Rating: 10/10 from 21 respondents	Fall 2022
Intermediate Financial Accounting II (ACCT 3620, 1 BSBA section, 22 students) Median Rating: 10/10 from 20 respondents Developed new course materials following restructuring of course content	Fall 2022
Financial Management (FIN 5203, 1 PMBA section, 39 students) Median Rating: 9/10 from 35 respondents Hybrid format core finance course	Summer 2022
Federal Income Tax 1 (ACCT 467/567, 2 BSBA/MAcc sections, 34 students) Median Rating: 10/10 from 33 respondents Designed entirely new curriculum and course materials Received the 2022 Reid Teaching Award for this course	Spring 2022
Cost Analysis and Control (ACCT 363, 1 BSBA section, 16 students) Median Rating: 10/10 from 15 respondents Created entirely new case-based curriculum	Spring 2022

University of Michigan

Evaluating Financial Performance (ACC 557, 2 MM sections, 123 students) Average Rating: 5.0/5.0 from 101 respondents (Dept. Avg. 4.6/5.0) Courses held online (synchronously) due to COVID-19 Received the 2021 Neary Teaching Excellence Award for this course	Summer 2020
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Accounting Principles (ACC 471, 1 undergraduate section, 53 students) Fall 2017
 Average Rating: 5.0/5.0 from 52 respondents (Dept. Avg. 4.7/5.0)
 Received the 2018 Dykstra Award for Teaching Excellence for this course

Other

Teaching Assistant, Financial Statement Analysis (EMBA 605) 2016 - 2021
 Not Rated, Instructor: Reuven Lehavy

Financial Accounting for Investment Banking (IB Workshop Series) Fall 2022
 Delivered targeted financial accounting lecture content for IB interview prep

Certificate from Harvard Business Publishing Case Teaching Workshop Spring 2022

CONFERENCE ATTENDANCE & PARTICIPATION

FARS Midyear Meeting (in Program) 2023
 AAA Annual Meeting (Presenter/Discussant) 2022
 ATA Midyear Meeting 2022
 FARS Midyear Meeting 2022
 Conference on Financial Economics and Accounting (in Program) 2021
 AAA Annual Meeting 2021
 FARS Midyear Meeting 2021
 AAA Rookie Camp (Presenter) 2020
 AAA Annual Meeting 2020
 AAA Annual Meeting (Discussant) 2019
 LBS Trans-Atlantic Doctoral Consortium (Presenter/Discussant) 2019
 AAA Annual Meeting (Moderator) 2018
 Wharton Theory Camp for Empiricists 2018
 Southeastern Academy of Legal Studies in Business Annual Meeting 2017
 UNC Doctoral Tax Seminar 2017
 Dopuch (Wash U) Accounting Conference 2021-2022
 Kapnick (Michigan) Accounting Spring Conference 2016-2021, 2023

GRANTS, HONORS AND AWARDS

Reid Teaching Award 2022
 FARS Excellence in Reviewing Award 2022
 Neary Teaching Excellence Award 2020
 Gerald and Lillian Dykstra Award for Teaching Excellence 2018
 Harry Jones Earnings Quality Grant (\$11,600) 2016

Paton Accounting Scholarship 2015 - 2021
 Doctoral Fellowship, Ross School of Business 2015 - 2020

INDUSTRY EXPERIENCE AND CERTIFICATIONS

Accounting Editor, Gleim Publications 2011 - 2013 & 2014 - 2015
 Tax Consultant, BDO USA 2013 - 2014
 Tax Researcher, Martello Law Group 2011 - 2013

SAS Proficiency Certification Earned 2015
 Certified Public Accountant, Florida #AC46435 2013 - Present

SOFTWARE EXPERIENCE

Data Analysis R; Python; Stata; SAS; Perl; Alteryx; JMP
Reporting LaTeX; Markdown; Tableau

REFERENCES

Reuven Lehavy
Full Professor
University of Michigan
rlehavy@umich.edu

Lindsey Gallo
Assistant Professor
University of Michigan
gallol@umich.edu

Zachary Kaplan
Assistant Professor
Washington Univ. in St. Louis
zrkaplan@wustl.edu