

JERRY D. MATHIS, PH.D., CPA

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ACADEMIC EXPERIENCE

Indiana University, Kelley School of Business

Visiting Assistant Professor

2023 - Present

Washington University in St. Louis, Olin Business School

Postdoctoral Research Associate

2021 - 2023

University of Michigan, Ross School of Business

Instructor

Fall 2017 & Summer 2020

EDUCATION

University of Michigan

Doctor of Philosophy, Accounting

2015 - 2021

Southern Methodist University

Master of Science, Business Analytics

2014 - 2015

University of Florida

Master of Accounting, Taxation

Bachelor of Science, Accounting

2009 - 2013

RESEARCH

Working Papers

- [1] Do Two Wrongs Make A Right? Strategically Forecasting EPS Through Inaccurate Share Forecasts (with Zachary Kaplan and Nathan Marshall)
Under first round review
- [2] Unearthing Firm Value: The effect of mandatory sustainability disclosures on firm information environments (solo-authored)
Revising for submission in mid-2024
- [3] Uncovering Fund Trade: Evidence from fund returns around portfolio disclosures (with Todd Gormley and Zachary Kaplan)
Revising for submission in mid-2024
- [4] Giving Away The Secret Sauce: Evidence on the consequences of actively managed ETF portfolio disclosures (with Zachary Kaplan and Jeremy Michels)
Reworking following presentation feedback

Works in Progress

- [1] How do mutual funds respond to earnings announcements? Evidence from trade timing (with Todd Gormley and Zachary Kaplan)
- [2] When Harry Met SALY: The Effects of Earnings Persistence on Analysts' Information Processing (with Alyssa Hagerty and Reuven Lehavy)
- [3] Now That You Mention It: Analyst Forecast Revisions and Firms' Macroeconomic Narratives (with Lindsey Gallo)

- [4] Selection Bias in Management Forecasting: Evidence from 8-K Filing Choices (solo-authored)
- [5] Chain Reactions: Unraveling the Benefits of Reverse Factoring in Supply Chain Finance (with Mahendra Gupta and Richard Palmer)

TEACHING EXPERIENCE

Indiana University

Intermediate Financial Accounting II (BUS A-312)

Recently nominated for the IU Trustee's Teaching Award for this course

Average Rating: X.X/7.0 from XX respondents (21 enrolled)

Average Rating: 6.9/7.0 from 65 respondents (82 enrolled)

Ongoing

Fall 2023

Washington University in St. Louis

Principles of Managerial Accounting (ACCT 2620)

Average Rating: 9.6/10.0 from 102 respondents (105 enrolled)

Spring 2023

Intermediate Financial Accounting I (ACCT 3610)

Average Rating: 9.7/10.0 from 21 respondents (23 enrolled)

Fall 2022

Average Rating: 10.0/10.0 from 19 respondents (21 enrolled)

Spring 2023

Intermediate Financial Accounting II (ACCT 3620)

Developed new course materials following restructuring of course content

Average Rating: 9.9/10.0 from 20 respondents (22 enrolled)

Fall 2022

Average Rating: 9.9/10.0 from 9 respondents (9 enrolled)

Spring 2023

Federal Income Tax 1 (ACCT 467/567, BSBA & MAcc students)

Designed entirely new curriculum and course materials

Received the 2022 Reid Teaching Award for this course

Average Rating: 9.8/10.0 from 33 respondents (34 enrolled)

Spring 2022

Cost Analysis and Control (ACCT 363)

Created entirely new case-based curriculum

Average Rating: 9.7/10.0 from 15 respondents (16 enrolled)

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)

Summer 2020

Courses held online (synchronously) due to COVID-19

Received the 2021 Neary Teaching Excellence Award for this course

Accounting Principles (ACC 471, 1 undergraduate section, 53 students)

Received the 2018 Dykstra Award for Teaching Excellence for this course

Average Rating: 5.0/5.0 from 52 respondents (Dept. Avg. 4.7/5.0)

Fall 2017

Other

Financial Management (FIN 5203, 2 PMBA sections)

WUSTL's core Professional MBA corporate finance course

Median Rating: 9/10

Summer 2022 & 2023

Teaching Assistant, Financial Statement Analysis (EMBA 605)

2016 - 2021

Not Rated, Instructor: Reuven Lehavy

Financial Accounting for Investment Banking (WUSTL IB Workshop Series)

Fall 2022

Delivered targeted financial accounting lecture content for IB interview prep

CONFERENCE ATTENDANCE & PARTICIPATION

FARS Midyear Meeting (Discussant)	2024
AAA Annual Meeting	2023
UNT Accounting Conference	2023
FARS Midyear Meeting (in Program)	2023
AAA Annual Meeting (Presenter/Discussant)	2022
ATA Midyear Meeting	2022
Conference on Financial Economics and Accounting (in Program)	2021
AAA Annual Meeting	2021
AAA Rookie Camp (Presenter)	2020
AAA Annual Meeting (in Program)	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

IU Trustee's Teaching Award (<i>Nominated; Pending outcome</i>)	2024
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

INDUSTRY EXPERIENCE AND CERTIFICATIONS

Accounting Editor, Gleim Publications	2011 - 2015
Tax Consultant, BDO USA (Previously Alpern Rosenthal, LLP)	2013 - 2014
Tax Researcher, Martello Law Group	2011 - 2013
SAS Proficiency Certification	Earned 2015
Certified Public Accountant, Florida #AC46435 (Inactive)	2013 - Present

SOFTWARE EXPERIENCE

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