JACOB A. MORTENSON

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EDUCATION

2010 - 2016	Ph.D. in Economics	Georgetown University
2010 - 2012	M.A. in Economics	Georgetown University
2003 - 2007	B.A. in Economics, Political Science	University of South Dakota

WORK EXPERIENCE

2015 - Present	Economist	Joint Committee on Taxation, U.S. House of Representatives
2012 - 2014	Research Analyst	Joint Committee on Taxation
2008 - 2009	Research Assistant	Joint Committee on Taxation
2006 & 2007	Summer Intern	Social Security Advisory Board

ACADEMIC JOURNAL PUBLICATIONS

"Household Incomes in Tax Data: Using Addresses to Move from Tax Unit to Household Income Distributions" with Jeff Larrimore and David Splinter, *Forthcoming: 2021, Journal of Human Resources.*

"Leakage from Retirement Savings Accounts in the U.S.," with Lucas Goodman, Kathleen Mackie, and Heidi Schramm. *Forthcoming: June 2021, National Tax Journal.*

"Bunching to Maximize Tax Credits: Evidence from the U.S. Tax Schedule" with Andrew Whitten. *American Economic Journal: Economic Policy, 2020, 12(3): 402-32*

"The Effect of Required Minimum Distribution Rules on Withdrawals from Individual Retirement Accounts" with Heidi Schramm and Andrew Whitten. *National Tax Journal*, 2019, 72(3), pp. 507-542. *Winner*: Richard Musgrave Prize for Best Paper in 2019 *National Tax Journal*.

"The Effect Of Recent Tax Changes On Taxable Income: Correction And Update" with Bradley Heim, *Journal of Policy Analysis and Management*, 2018, 37(3), pp. 686-694.

"Whose Child is This? Shifting of Dependents Among EITC Claimants Within the Same Household" with David Splinter [lead author] and Jeff Larrimore, *National Tax Journal*, 2017, 70(4), pp. 737-757.

"Recent Income Trends for Top Executives: Evidence from Tax Return Data" with Seth H. Giertz, *National Tax Journal*, 2013, 66(4), pp. 913-938.

OTHER PUBLICATIONS

"Income and Earnings Mobility in U.S. Tax Data" with Jeff Larrimore and David Splinter. *Board of Governors of the Federal Reserve System: 2015 Community Development Research Conference*, 2015, pp. 482-516.

"Investor Responsiveness to Capital Gains Taxes During the Great Recession." with Tim Dowd and Rob McClelland. *Urban-Brookings Tax Policy Center Research Report*, September 2019.

"Attaching the Left Tail: A New Profile of Income for Persons Who Do Not Appear on Federal Income Tax Returns" with James Cilke, Michael Udell, and Jonathan Zytnick, *National Tax Association Proceedings*, 2009, pp. 88-102.

INVITED PRESENTATIONS

Mannheim Taxation Conference (virtual, Sep. 2020); Tax Economists' Forum (virtual, Sep. 2020); International Online Public Finance Seminar Series (virtual, May 2020); Utah Tax Invitational (U-TAXI) (Salt Lake City, UT, June 2019); National Tax Association (NTA) Annual Conference (New Orleans, LA, Nov. 2018); Association for Policy Analysis & Management Annual Conference (Washington, DC, Nov. 2018); Brown University Economics Dept. (Providence, RI, Apr. 2018); National Bureau of Economic Research (NBER) Public Economics Meeting (Cambridge, MA, Apr. 2018); Office of Tax Analysis (OTA) Research Conference, U.S. Treasury Department (Washington, DC, Sep. 2017); NTA Spring Symposium (Washington, DC, May 2017); NBER Public Economics Meeting (Cambridge, MA, Apr. 2017); Tax Economists' Forum (Washington, DC, July 2016); Allied Social Science Association (ASSA) Annual Conference (San Francisco, CA, Jan. 2016); Beacom School of Business, University of South Dakota (Vermillion, SD, Dec. 2015); Martin School of Public Policy, University of Kentucky (Lexington, KY, Jan. 2015); OTA, U.S. Treasury Department (Washington, DC, Jan. 2015); ASSA Annual Conference (Boston, MA, Jan. 2015); NTA Annual Conference (Santa Fe, NM, Nov. 2014); Midwest Economics Association (MEA) Annual Conference (Evanston, IL, Mar. 2014); ASSA Conference (Philadelphia, PA, Jan. 2014); ASSA Annual Conference (San Diego, CA, Jan. 2013); NTA Annual Conference (Denver, CO, Nov. 2009); MEA Annual Conference (Chicago, IL, Mar. 2008)

TEACHING EXPERIENCE

GEORGETOWN UNIVERSITY

Public Economics	Teaching Assistant	Fall 2011, Fall 2012
Money, Banking, & Financial Markets	Teaching Assistant	Spring 2012

UNIVERSITY OF NEBRASKA-LINCOLN

Principles of Macroeconomics	Teaching Assistant	Fall 2009
Money & Banking	Teaching Assistant	Fall 2009
Intermediate Microeconomics	Teaching Assistant	Spring 2010

HONORS, SCHOLARSHIPS, AND FELLOWSHIPS

2019	Richard Musgrave Prize for Best Paper in 2019 *National Tax Journal*
2015 - 2016	Washington Center for Equitable Growth Dissertation Grant ($15,000)
2014 - 2015	Vernon E. Jordan Fellowship, Consortium of Universities of the Washington Metropolitan Area, for "All Income is Not Created Equal: Cross-Tax Elasticities in the US." ($10,000)
2010 - 2014	Georgetown University Graduate School Fellowship
2010 - 2016	Georgetown University Graduate School Full Scholarship
2007	Phi Beta Kappa - University of South Dakota

STATISTICAL AND SOFTWARE PACKAGES

Stata, SAS, SQL, Matlab, Microsoft Office, LaTeX, R