

# JACOB A. MORTENSON

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[jacobmortenson.com](http://jacobmortenson.com)

## EDUCATION

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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

## REFERENCES

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Professor Arik Levinson Department of Economics Georgetown University <a href="mailto:aml6@georgetown.edu">aml6@georgetown.edu</a> 202-687-5571	Professor John Rust Department of Economics Georgetown University <a href="mailto:jr1393@georgetown.edu">jr1393@georgetown.edu</a> 202-687-6806	Dr. Timothy Dowd Senior Economist Joint Committee on Taxation <a href="mailto:tim.dowd@jct.gov">tim.dowd@jct.gov</a> 202-225-3621
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## WORK EXPERIENCE

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

## TEACHING EXPERIENCE

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### 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

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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 Create Equal: Cross-Tax Elasticities in the US." (\$10,000)
2013 - 2014	Georgetown University Graduate School Fellowship
2010 - 2011	Georgetown University Graduate School Fellowship
2010 - 2016	Georgetown University Graduate School Full Scholarship
2013 & 2014	Georgetown University Research Travel Grant
2007	Phi Beta Kappa - University of South Dakota

## INVITED ACADEMIC PRESENTATIONS

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National Tax Association Spring Symposium (Washington, DC, May 2017), National Bureau of Economic Research Public Economics Meeting (Cambridge, MA, Apr. 2017), Allied Social Science Association 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), Office of Tax Analysis, U.S. Treasury Department (Washington, DC, Jan. 2015), Allied Social Science Association Annual Conference (Boston, MA, Jan. 2015), National Tax Association Annual Conference (Santa Fe, NM, Nov. 2014), Midwest Economics Association Annual Conference (Evanston, IL, Mar. 2014), Allied Social Science Association Annual Conference (Philadelphia, PA, Jan. 2014), Allied Social Science Association Annual Conference (San Diego, CA, Jan. 2013), National Tax Association Annual Conference (Denver, CO, Nov. 2009), Midwest Economics Association Annual Conference (Chicago, IL, Mar. 2008)

## PUBLICATIONS

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

**“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 Zytznick, *National Tax Association Proceedings*, 2009, 88-102.

**“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, p. 482-516.

**“A Comment on ‘The Effect of Recent Tax Changes on Taxable Income: Evidence from a New Panel of Tax Returns’”** with Bradley Heim. *Forthcoming in the Journal of Policy Analysis and Management*.

## WORKING PAPERS

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**“Bunching to Maximize Tax Credits: Evidence from the U.S. Tax Schedule”** with Andrew Whitten.

**“The Effect of Required Minimum Distribution Rules on Withdrawals from Individual Retirement Accounts”** with Heidi Schramm and Andrew Whitten.

**“Household Incomes in Tax Data: Using Addresses to Move from Tax Unit to Household Income Distributions”** with with Jeff Larrimore and David Splinter. *Finance and Economics Discussion Series, Divisions of Research & Statistics and Monetary Affairs, Federal Reserve Board, Washington, D.C. No. 2017-002*.

**“All Income is Not Created Equal: Cross-Tax Elasticities in the U.S.”**

## STATISTICAL AND SOFTWARE PACKAGES

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