Greg Geisler, PhD, CPA (up to date as of Oct. 4, 2020)
Indiana University (Bloomington), Kelley School of Business, Hodge Hall #5107,
1309 E. 10th Street, Bloomington IN 47405, 812-855-3834 geisler@iu.edu

WORK EXPERIENCE, EDUCATION and PROFESSIONAL CERTIFICATION

Clinical Professor, Indiana University 2018 – present
Professor, University of Missouri-St. Louis (UMSL) 2017 – 2018
Associate Professor, UMSL, 2006 – 2017; Assistant Professor, UMSL, 2002 – 2006.
Visiting Assistant Professor, Indiana University-Bloomington 2001 – 02
Assistant Professor, Georgia State University 1995 – 2001
Ph.D., Accounting, University of North Carolina at Chapel Hill 1995
Lecturer, University of North Carolina at Chapel Hill 1994 – 95
Research Assistant, Professors Julie Collins and Doug Shackelford 1990 – 94
Analyst, PricewaterhouseCoopers Tax Policy Economics Group, Washington D.C. 1992 summer
M.B.A., University of Pittsburgh 1990
Senior Tax Accountant, Touche Ross (now, Deloitte), Pittsburgh PA 1987 – 89
Tax Accountant, Kavanagh and Milano P.C., Pittsburgh PA 1984 – 87
Certified Public Accountant (Pennsylvania) (inactive)
B.B.A., Accounting, University of Notre Dame 1984

TEACHING of Taxation courses

Taxes and Individual Financial Planning (BSBA-Finance) 2019 – present
Tax Analysis (BSBA-Finance) 2018 – present
Taxes and Decision Making (BS-Accounting) 2018 – present
Federal Income Tax (BS Accounting) 2002 – 2017 (6.4 / 7 Rating since 2012)
Tax Seminar: Taxes and Investments (MACC) 2010 – 2018 (6.6 / 7 Rating since 2012)
Adv. Federal Income Tax on Businesses (MACC) 2005-11, 2015-17 (6.8 / 7 Rating since 2015)
Taxes & Business Strategy (MBA). Synchronous sessions - 10 nights per term. 2014 – 2018.
University of North Carolina-Chapel Hill Online MBA program
Advanced Tax Topics: Taxes and Investments (MACC) (½ of 3 credit course) 2007 – 2009
Taxes and Manager's Decisions (MBA) 2003 – 2006
Taxes and Decision Making (Indiana Univ.) 2002
Tax Analysis (at IU) 2002
Taxation of C Corps., S Corporations, & Shareholders (at Georgia St. U) (MTx)1995 – 2001
Introduction to Federal Income Taxation (at GSU) 1995 – 2001

TEACHING RELATED AWARDS and GRANTS

Nominated for American Accounting Association's Cook/Deloitte Undergraduate Superior Teacher prize 2019, 2020
Chancellor's Award for Excellence in Teaching (awarded to one UMSL professor per year) 2017
UMSL Summer Research and Teaching Grants Program 2008, 2013, 2017

Governor's Excellence in Teaching Award (awarded to one UMSL professor per year) 2006
American Taxation Association / Deloitte & Touche Teaching Innovation Award for "M. Tx. Writing Web Site" (one of seven coauthors) 2004
UMSL Recipient of Certificate of Exemplary [Blackboard] Integration (i.e.,course website) 2002
GSU Biannual Accounting Junior Faculty Outstanding Teacher Award 2000
GSU Center for Teaching and Learning Instructional Improvement Grants 1999, 2000

OTHER TEACHING RELATED ACTIVITIES

Require TopHat app (i.e., student response via cellphone) for all courses (2018 – present) for all face-to-face classroom presentations
Require PlayPosit app (i.e., student response to asynchronous videos) for all courses (summer, 2020 – present) with prerecorded presentations
Require iClickers (i.e., student response device) for all courses (2008 - 2018)
Coauthor of a web site ("M. Tx. Writing Web Site," at www.gsu.edu/~accerl) that develops written communication skills of students through lessons, examples, & self-tests 2004
University of Missouri system "New Faculty Teaching Scholars" program 2003 – 04

ADVISING of Students

UMSL: Faculty Sponsor of "Accounting Internship (in taxation) for Academic Credit" (Acctng 3490 and 5490): 62 students from 2005 - 2018
UMSL: Faculty Sponsor of "Accounting Independent Research" (Acctng 5499) for student leaders of Volunteer Income Tax Assistance (VITA) program: 7 students 2014 - 2018

RESEARCH AWARDS

Montgomery-Warschauer Award for 2017: Honors the paper published in the Journal of Financial Planning in the prior year that provided the most outstanding contribution to the betterment of the profession.* - (see article below)
https://www.onefpa.org/about/Press-Room/Pages/UMSL-Professor-to-Receive-2017-Montgomery-Warschauer-Award.aspx

CURRENT RESEARCH IDEAS

"Tax Planning Along the Spectrum from Income That Produces No Cash Flow to Excludible Income That Produces Tax-Free Cash Flow"

ARTICLES IN PROGRESS

"Tax-efficient Decumulation: Further Analysis" in process of revision based on reviewers' comments and resubmission to *Journal of Financial Planning* by end of October, 2020.

PUBLISHED PRACTITIONER RESEARCH (see executive summaries of articles through 2019- https://kelley.iu.edu/faculty-research/faculty-directory/profile.cshtml?id=GEISLER)

“On the Way to Financial Freedom when Beginning a Career” accepted at *Journal of Financial Service Professionals*, October 2020 (anticipated publication date).

“Should Charitable Taxpayers Donate Directly from an IRA or Donate Appreciated Securities?” with Bill Harden, *Journal of Financial Planning, December 2019: 46-56.*

“Tax Planning around the Phase-Out of the Qualified Business Income Deduction for Professional Service Businesses,” with Dawn Drnevich, *Journal of Financial Planning, June 2019*: 50-56.

“The Marriage Tax Penalty: Implications for High-Income Taxpayers,” with Dawn Drnevich, *Tax Notes, 4/22/19: 557-564.*

“The Effect of Social Security Benefits and Required Minimum Distributions on Tax-Efficient Withdrawal Strategies,” with David Hulse, *Journal of Financial Planning, February, 2018*: *36-47.*

“Taxable Social Security Benefits and High Marginal Tax Rates,” *Journal of Financial Service Professionals, September, 2017: 55-67.*

“Investing in Stocks inside Retirement Accounts and Bonds in Taxable Accounts,” *Journal of Financial Service Professionals, September, 2017: 77-89.*

“The Taxation of Social Security Benefits and Planning Implications,” with David Hulse, *Journal of Financial Planning, May, 2016: 52-63*

* - “Could a Health Savings Account Be Better than an Employer-Matched 401(k)?” *Journal of Financial Planning, January, 2016: 40-48*

“529 Plan Distributions and Federal Tax Credits,” with Rebecca Bischoff, *Journal of Financial Service Professionals, November, 2015: 64-69.*

“Understand the Key Differences in MO, IL, and KS When Advising Clients on 529 Plans,” with Stephen Moehrle, *The Asset*, *January, 2015: 24-25*

“Traditional versus Roth 401(k) Contributions: The Effect of Employer Matches,” with David Hulse, *Journal of Financial Planning, October 2014: 54-60*

“Retirement Account Options When Beginning a Career,” with Jerrold Stern, *Journal of Financial Service Professionals, May 2014: 45-50*

"Federal Income Tax Laws That Cause Individuals' Marginal and Statutory Tax Rates to Differ," *Journal of Accounting Education, 2013, Vol. 31, Issue 4: 430-460*

"The Effect of State Taxes on Baseball Free Agents," w/ Stephen Moehrle, *State Tax Notes, March 18, 2013: 869-878*

"Missouri Tax Savings Are the MOST," with Stephen Moehrle, *The Asset,November, 2011: 18-20*

"Taking Stock of Employee Stock Purchase Plans," with Tim Farmer, *Journal of Accountancy, May, 2007: 44-48.*

"MO$T (Missouri's 529 college savings plan) is a Must", *The Asset, March, 2007: 7*

"Comments on Stock Option Exercise Date Manipulation," *Tax Notes, January 15, 2007: 215–216*

"Best Use of Spare Cash," *Journal of Accountancy, September, 2006: 41-43.*

"An AMT Trap That Caught Teresa Heinz Kerry in 2003," *Tax Notes, July 18, 2005: 317–318.*

"Current Year Tax Laws that Cause Low Visibility of an Individual's Effective Marginal Tax Rate," with Ernie Larkins, *Tax Notes, November 3, 2003: 627–634.*

"Retirement Savings Credit: Investing $1,500 at a Cost of $284," with Kelley Wingbermuehle, *Tax Notes, July 7, 2003: 69–71.*

"Selling a Principal Residence After TRA '97," with Nell Adkins and Steven Thompson, *The Tax Adviser, February 1998: 116–121.*

"The Disparate Treatment of Mobile and Long-Term Homeowners Under the New Home Sale Rules," with Michael Calegari, *Real Estate Tax Digest, May 1998, Vol 16, #5: 161–167.*

ACADEMIC RESEARCH

"The Use of Compensation for Tax Avoidance by Owners of Privately-Held Corporations," with Sally Wallace, *Journal of American Taxation Association, Spring 2005, Volume 27, Number 1:73–90*

"Marginal Tax Rates on Foreign Profits of U.S. Multinationals," with Ernie Larkins, *Advances in Taxation, 2002, Vol. 14: 85–116.*

"Equity Security Investments: Evidence on Tax-Induced Dividend Clienteles," *Journal of*

American Taxation Association, Spring 2000, Volume 22, Number 1:1–17.

"The Effects of Taxes, Regulation, Earnings, and Organizational Form on Life Insurers' Investment Portfolio Realizations," with Julie Collins and Douglas Shackelford, *Journal of Accounting and Economics 1997, Volume 24, Number 3: 337–361.*

ACADEMIC TEACHING RELATED RESEARCH

"Implementing Teaching Portfolios and Peer Reviews of Tax Courses," with Michael Calegari and Ernest Larkins, *Journal of American Taxation Association (Educator's Forum), Fall 1999, Volume 21, Number 2: 95–107.*

PRESENTATIONS

The following were based on a competitive application process:
Financial Planning Association annual conference (for Certified Financial Planners) 2019
American Accounting Association annual meeting: Research Forum 1997, 2001, 2002, 2019
American Accounting Association annual meeting 2011, 2013, 2014, 2016, 2017
American Taxation Association Mid-Year Meeting 1998, 2014
Focus on Teaching & Technology - A Regional Conference (UMSL), 2008, 2010, 2013
American Accounting Assoc. annual meeting: Effective Learning Strategies 2006, '07, '09, '11
Midwest Regional Meeting-American Accounting Association, 2003, 2007
American Accounting Association annual meeting: Research Forum 1997, 2001, 2002
Southeast Summer Accounting Research Conference 1995, 1997, 2000

The following were invited:
Greater Indiana Financial Planning Assoc. (for Certified Financial Planners) Sept. 18, 2020
Greater Pittsburgh Financial Planning Assoc. (for Certified Financial Planners) July 9, 2020
Greater Indiana Financial Planning Assoc. (for Certified Financial Planners) Sept. 20, 2019
Teaching Food for Thought: "Using Top Hat in the Classroom" co-presenter Apr. 26, 2019
IU Student Financial Planning Assoc. Feb. 19, 2019, Oct. 6, 2020
Greater Kansas City Financial Planning Assoc. (for Certified Financial Planners) Jan. 16, 2019
Greater Indiana Financial Planning Association (for Certified Financial Planners) Nov. 16, 2018

UMSL Pierre Laclede Donor's Society: Tax-Advantaged Charitable Contributions 2018
Financial Planning Association annual conference (for Certified Financial Planners) 2017
UMSL Focus on Teaching and Technology Conference panel on award winning teachers 2017
Greater St. Louis Financial Planning Association (for Certified Financial Planners) Feb. 2, 2017

UMSL College of Business faculty 'Teach It Forward' 2015
UMSL Beta Alpha Psi 2008, 2011, 2017

UMSL Accounting Club 2010
UMSL Staff Association 2008
UMSL College of Business's 'Breakfast and Business' 2006, 2007, 2009
UMSL 'Peer Evaluation of Group Writing Projects (with 3 or more group members)   2007
St. Louis chapter of Institute of Management Accountants 2007
UMSL 'Engaging Learners with Clickers in the Classroom' 2006
Southeastern Regional Meeting-American Accounting Association (Discussant)   1999
Southeastern Regional Meeting-Doctoral Consortium   1998
Center for Economic Policy Research/Stanford University
- Annual Workshop on Life Insurance Taxation   1993

SERVICE

IU:
Faculty Advisor for VITA (Volunteer Income Tax Assistance) performed by Beta Alpha Psi (members of honorary accounting fraternity) 2019-20
Member of Kelley School of Business Finance Graduate Programs committee 2018 - 21
Recruited the undergraduate team that won Deloitte FanTAXtic National Competition 2018

UMSL:
Chair of UMSL Budget and Planning Committee 2017 - 2018
Member of UMSL Budget and Planning Committee 2014 - 2017
Chair of UMSL Accounting Department's Scholarships Committee 2012 - 2018
Coordinator: UMSL Accounting Dept's "Accounting Internship for Academic Credit" 2007-18
Updated UMSL Accounting Dept.'s website in 2015:
University of Missouri System Research Board: Peer review of paper submitted for funding 2015
Organizer: Accounting Professional Skills workshop (1st through 5th annual) 2010 - 2014
- Prepare students for job interviews

Member of UMSL Accounting Advisory Board 2009–2018
Chair of Accounting Department's "Faculty Recruiting Committee" 2011-12
Wrote UMSL Accounting Program brochure 2011, updated in 2015
Member of Ad Personam Committee for Review of Natalia Mintchik's Promotion&Tenure 2011
Train/teach all students in Volunteer Income Tax Assistance (VITA) program 2010 - 16
Member of UMSL AACSB Accounting Accreditation maintenance committee 2005-06, 2010-11
Chair of Ad Personam Committee for Review of Pamela Stuerke's Promotion and Tenure 2008
Member of UMSL Accounting Area Scholarships Committee 2004 – 2011
Coordinator: Steve Moehrle's nomination for UMSL Chancellor's teaching excellence award '07
Chair of UMSL College of Business Admin. (CBA) Undergrad Studies Committee 2006 – 07
- Developing revised UMSL CBA Graduation and Retention Requirements 2007
- Developed UMSL CBA Admission Requirements. Approved by full CBA faculty 2006

Chair of UMSL CBA Post-Tenure Review Ad Hoc Committee 2005 – 06
- Developed UMSL CBA Post-Tenure Standards. Approved by tenured CBA faculty '06

Member of UMSL CBA Faculty Research and Development Committee 2007 – 08
Member of UMSL Accounting Area Faculty Recruiting Committee 2004 – 06, 2008, 2013
Member of UMSL CBA ad personam committee- Dr. Jennifer Reynolds-Moehrle's T&P application
Member of UMSL CBA Undergraduate Studies Committee 2003 – 06

GSU:
Member of GSU Accounting Faculty Recruiting Committee 2001
Member of GSU Master of Taxation Program Assessment Committee 1997 – 2000
Member of two dissertation committees at GSU
Reviewer:
- Ad Hoc Reviewer for Financial Services Review 2019
- Ad Hoc Reviewer for Journal of Accounting, Auditing and Finance 2018-19
- AAA annual meeting reviewer of two ATA papers 2017, 2018, 2019
- Member of Issues in Accounting Education Editorial Board 2010 – 2012
- Member of Journal of American Taxation Association Editorial Board 2002 – 04, 2009 – 11
- Ad Hoc Reviewer for Accounting and Business Research 2013/2016
- Ad Hoc Reviewer for Journal of American Taxation Association 2002, 2006, 2008
- Ad Hoc Reviewer for Contemporary Accounting Research 2004
- External Reviewer of Research, Prof. Lynn Jones of Univ. of N. Florida (for tenure) 2008

American Taxation Association:
- Chair of Deloitte Tax Teaching Innovation Award Committee 2018
- Member of Deloitte Tax Teaching Innovation Award Committee 2009-2011, 2013-2015, 2017, 2019, 2020, 2021
- Chair of PricewaterhouseCoopers (PWC) Dissertation Award Committee 2007
- Member of PWC Dissertation Award Committee 1996, '97, 2000, '02, '05, '06, '08, '12
- Member of Tax Manuscript Award Committee 1998, 1999, 2001, 2003, 2004, 2006

QUOTES:
- Quoted in St. Louis Post-Dispatch - June 12, 2020 Working from home instead of in the city? Don't expect a break from paying the St. Louis earnings tax.(paywall)
- Featured on 4:30 pm and 6:00 pm Indianapolis WXIN-TV (Fox 59) newscast on May 22, 2020: https://fox59.com/news/people-across-indiana-still-waiting-on-stimulus-checks/
- Quoted on NPR radio, "Marketplace" part of the news, May 12, 2020: https://www.marketplace.org/2020/05/12/covid-19-stimulus-check-irs-direct-deposit/
- Featured on 5:30 pm Indianapolis WTHR-TV (NBC) newscast April 23, 2020: https://www.wthr.com/article/wheres-federal-stimulus-dollars-answer-complicated
- Featured on 10 pm Indianapolis WISH-TV (CW) newscast April 14, 2020: https://www.wishtv.com/news/local-news/4-answers-to-common-questions-about-your-stimulus-check/.
- Featured guest on podcast: https://apexbg.com/53-the-hsa-shoebox-theory-strategy-for-long-term-financial-planning/
- Featured guest on podcast: http://apexbg.libsyn.com/41-hsa-the-best-use-of-spare-cash-in-2018

- Quoted in *Money* magazine article on p.40 of March, 2018 issue in article titled “Make This One Change to Your Retirement Account Now, Tax Experts Say”, and online on January 12, 2018 http://time.com/money/5097654/make-this-one-change-to-your-retirement-account-now-tax-experts-say/?iid=sr-link1
- Quoted in *Money* magazine article on pp. 25 & 27 of December, 2017 issue in article titled “Are You Putting Too Much in Your 401(k)?”, and online on September 28, 2017 http://time.com/money/4956393/are-you-putting-too-much-in-your-401k/?iid=sr-link2
- Quoted in *Money* online on November 3, 2017 http://time.com/money/5009453/an-important-tax-deduction-for-seniors-and-their-families-is-on-the-chopping-block/
- Quoted in *Money* magazine article on p. 38 of April, 2017 issue in article titled “Retire Early? Yes, You Can” http://time.com/money/4697410/early-retirement-tips/
- Quoted in *Consumer Reports* online magazine article on February 24, 2017 in article titled “How Health Savings Accounts Work” http://www.consumerreports.org/health-savings-accounts/how-health-savings-accounts-work/
- Quoted in *Money* magazine article on p. 27 of September, 2016 issue in article titled “5 Things to Know About HSAs Now” http://time.com/money/4450518/health-savings-accounts-what-know/
- Quoted in CNBC.com article 6/15/16 www.cnbc.com/2016/06/15/health-savings-accounts-a-second-retirement-plan.html
- Quoted in Weekend Investor section of *Wall Street Journal* 1/23/16
- Appeared on St. Louis KMOV-TV Channel 4’s 6 pm news discussing Monsanto’s proposed merger 6/9/15
- Quoted on front page of first section in *St. Louis Post-Dispatch* 6/23/14
- Featured in UMSL Daily: http://blogs.umsl.edu/news/2014/04/23/first-job/
- Quoted in Business section of *USAToday.com* 2014
- Quoted in Business section of *St. Louis Post-Dispatch* 2005, ’06, ’09, 2/7/16, 4/19/16, 6/14/16
- Quoted in Personal Finance column of Business section in *St. Louis Post-Dispatch* 2008

AWARDS

Montgomery-Warschauer Award (donated to charity) 2017
Phi Kappa Phi (Honor Society) (inducted in) 2017
UMSL Summer Research Awards 2004, 2014, 2017
GSU Research Program Course Releases (for working papers) 1997, 2000
Ernst & Young Doctoral Dissertation Fellowship 1993 – 94
Coopers & Lybrand (now PWC) Scholar (Fellowship) 1990 – 92
Associates Fellowship (University of Pittsburgh) 1989 – 90

PARTICIPANT (by invitation):

University of Illinois (biannual) Tax Symposium 2001, 2003
University of North Carolina Tax Symposium 1997 – 2004, 2009, 2016

COMMUNITY RELATED SERVICE

Volunteer Income Tax Assistance tax return preparer/reviewer: Bloomington, IN (Hodge Hall)
March, 2020

Volunteer Income Tax Assistance tax return preparer/reviewer: Ferguson, MO 2016 - 2018

CYC/West County Basketball Treasurer (over 240 teams) 2010 – 2012; 2015 – 2016