VITA

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Fields of Interest: Public Economics, Distribution of Income and Wealth, Household and Family Economics

Degrees:
B.A. Harpur College - 1969
Ph.D. University of Pennsylvania - 1976

Work Experience:

Lecturer - Rutgers College, 1974-1976
Research Associate - Institute for Research on Poverty - University of Wisconsin-Madison, 1976-1979
Assistant Professor - Michigan State University, 1979-1981
Associate Professor - Michigan State University, 1981-1986
Visiting Associate Professor - University of Pennsylvania, 1982-1983
Professor - Michigan State University, 1986-
Academic Visitor - London School of Economics 1988.
Senior Economist for Economic Policy - Office of Management and Budget, 1990-1991.
Chairperson, Department of Economics, Michigan State University, 1992-1996.
Visiting Scholar, Congressional Budget Office, 1997 – 1998 Tax Analysis Division
Academic Visitor, University College London, 2003
Academic Visitor, Victoria University, Wellington New Zealand, fall 2010, visiting Instructor 2013 (first trimester) and 2015 (first trimester, Visiting Professor March 2017.
Director of Graduate Programs, Department of Economics, 2005-2009, 2012-2013 and (fall) 2015.

Publications:

"A Note: Should Wealth Matter?" 1977. In The Treatment of Assets and Income from Assets in Income Conditioned Government Benefit Programs, Federal Council on the Aging, Washington, D.C., Government Printing Office, pp. 212-229.

"Intergenerational Transmission in Inequality: An Empirical Study of Wealth Mobility," (1979) Economica 46: 349-362, (November).

"The Importance of Material Inheritance: The Financial Link Between Generations," 1980. Chapter 4, pp. 159-185, in Modelling the Distribution and Intergenerational Transmission of Wealth, J. Smith, editor. Volume 46 in NBER Studies on Income and Wealth, University of Chicago Press for the National Bureau of Economic Research, Chicago, IL.

"Primogeniture, Equal Sharing, and the U.S. Distribution of Wealth," (1980) Quarterly Journal of Economics 93: 299-316, (March).

"Some Issues in the Measurement of Income Inequality," in Value Judgements and Income Distribution, C. Anderson and R. Solo editors, Praeger, 1981 (27 pages).

"Volunteer Labor Supply in the Provision of Collective Goods," (1981) Papers on Public Economics 6: 163-181. [with Burton A. Weisbrod].

"The Intangibles Tax," Chapter 20 in Michigan's Fiscal and Economic Structure, H. Brazer ed. pp. 537-562 + 7 pages of tables; University of Michigan Press; Ann Arbor, 1982.

"On the Economics of Inheritance," (1982) Marriage and Family Review 5: 61-74.

"Distribution of Estate Wealth and its Relationship to Intergenerational Transfers" (with Martin David) - Selected Papers Given at the 1982 Meeting of the American Statistical Association, appearing in Statistics of Income and Related Administrative Record Research, Department of Treasury, pp. 103-108, 1982.

"The Incidence of a Lifetime Consumption Tax," (1982) National Tax Journal 35: 189-204. (with Martin David).

"Income Distribution, Lifetime Savings and Bequests" (1983) American Economic Review 73: 672-690 (September) (with Martin David).

"Reply and Comment on Brown" ["Bequests and Horizontal Equity Under a Consumption Tax"], 1983, National Tax Journal (December) 36: 515-520.

"Non-earned Income, income Instability and Inequality - A Life Cycle Interpretation," (with M. David) 1984 in the Collection and Analysis of Economic and Consumer Behavior Data: Essays in Honor of Robert Ferber, Seymour Sudman, editor, University of Illinois Press.

"Inheritance as Compared to Estate Taxation," in West Virginia Tax Study, 1984 report of the West Virginia Tax Study Commission, 35 pages.

Comment and discussion of "Interfamily Transfers and Income Redistribution," by Donald Cox and Frederic Raines, in Horizontal Equity, Uncertainty and Economic Well-Being, M. David and T. Smeeding editors, NBER Conference on Income and Wealth, vol. 50, 1985, University of Chicago Press.

"The Effect of Social Security on Lifetime Saving and Bequests," (1985) Economica, 52:421-434 (November) (with Martin David).

"Volunteer Labor Supply," (1987) Journal of Public Economics 154-183 (with Burton Weisbrod).

"Planned and Unplanned Bequests," (1987) Economic Inquiry 25:55-66 (with Daniel Hamermesh). **Winner of the prize from Economic Inquiry as Best Article of 1987.**

"Unequal Estate Division: Is It Altruism, Reverse Bequests or Simply Noise," pp. 105-116 in Modelling the Accumulation and Distribution of Wealth, Denis Kessler, and Andre Messon, 1988 Editor, Oxford University Press.

"Changes in Cohort Wealth Over a Generation," Demography, August, 1988 (with Martin David).

"Inheritance: The Treatment of Women," 1989, Chapter 6 in Women's Life Cycle and Economic Insecurity: Problems and Proposals, edited by Martha N. Ozawa, Greenwood Press.

"Using Panel Data to Assess the Bias in Cross-Sectional Inferences of Life-Cycle Changes in the Level and Composition of Household Wealth," 1989 in Measurement of Saving, Investment and Wealth, Robert Lipsey and Helen Tice, editors, University of Chicago Press for NBER (with Nancy Jianakoplos and F. Owen Irvine).

"The Distribution of Federal Expenditures," (1991) National Tax Journal 44:269-276.

"Wealth Inequality as a Cohort Ages" (1993) with Nancy Jianakoplos, vol. 4 Research in Economic Inequality in Festscrift in Honor of Nancy Ruggles, Edward Wolff editor, JAI Press, pp. 81-98.

"Economic Status as a Determinant of Mortality Among Non-White and White Older Males," (1993) Population Studies, 47:427-436.

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"Michigan's Changing Income Distribution," (1995) Michigan's Policy Choices, pp. 21-44 (with Bettie Menchik), Michigan State University Press.

"Saving Behavior of Older Households: Rate of Return, Precautionary and Inheritance Effects," (1996) with Nancy Jianakoplos and Owen Irvine, Economics Letters, 50: 111-120.

Household and Family Economics, P. Menchik editor, (1996), Kluwer Academic Publishers.

"Wealth Mobility," (1997), Review of Economics and Statistics, 79: 18-31, (with Nancy Jianakoplos).

"Black-White Wealth Inequality: Is Inheritance the Reason?", (1997), Economic Inquiry, 35: 428-442, (with Nancy Jianakoplos).

"Intergenerational Transfers: Are They Intended" unpublished paper (with Nancy Jianakoplos).

"Demographic Change and State Expenditures: The Case of Michigan", 2002, Proceedings of the 2001 Conference of the National Tax Association, pp. 90-99.

"Michigan's Income Tax", 2003, in Michigan at the Millenium, C. L. Ballard et al, editor, MSU Press, pp. 535-567.

"Consumption Patterns, Demographic Change, and Sales Tax Revenue: Is Yet Another Fiscal Shock on the Horizon?", 2004, pp. 367-378, in Proceedings of the 2003 Conference of the National Tax Association.

"Tax Exporting Through Federal Deductibility of State and Local Taxes" (with Charles Ballard), 2005, pp. 26-38, in Proceedings of the 2004 Conference of the National Tax Association .

"Alternative Minimum Taxpayers: Who they are and Where they live" (with Charles Ballard), 2006, pp 264-272, in Proceedings of the 2005 Conference of the National Tax Association.

"Changes in the Income Distribution in Michigan 1976-2006, with Comparisons to Other States", (with Charles Ballard), 2009. Institute for Public Policy and Social Research discussion paper.

Review of "The Gender Impact of Social Security Reform" by Estelle James, Alejandra Cox Edwards, and Rebecca Wong. University of Chicago Press, 2008. Published in Economic Development and Cultural Change, October 2010, pp240-243.

In Memoriam: Warren Samuels (1933-2011) with Jeff Biddle. Journal of Income Distribution 20: 4, pp.3-5 (2011).

"Changes in the Level and Distribution of Income in Michigan 1976-2013, With Comparison to Other States", 2015, *Michigan Academician*, 42:1, 76-107 (with Charles Ballard).

"The States(s) of Inequality: Changes in Income Distribution in the 50 States and the District of Columbia, 1976-2008", in *Journal of Income Distribution*, 22:2, 25-59, June 2013. (with Charles Ballard and Lu Tan).

Current Research:

Investigation into reasons for the increase in income inequality through the analysis of cross-state differences in the trend towards income disequalization in the United States.

Research on optimal "tax complexity" as a mechanism for revelation of heterogeneity in response to tax prices. There is a paper on this line of research, "Optimal Taxation with Optimal Tax Complexity: The Case of Estate Taxation". joint with John Wilson to be presented at a conference of the International Institute of Public Finance In Tampere Finland in late August 2018.

Grants Received:

Three grants from the National Science Foundation, one from the Social Security Administration, and one from the U.S. Department of Health and Human Services via the Institute for Research on Poverty.

Additional Professional Activities:

Served as a Tax and Expenditure Advisor for three States and five U.S. government agencies.

Over 85 paper presentations at other universities and conferences around the world.

Member of the Editorial Board of the Journal of Income Distribution.

Professional Memberships:

Member of the NBER Conference on Income and Wealth.

American Economics Association.

National Tax Association - Tax Institute of America.

Who's Who in Economics (editions 2 and 3)

Who's Who in America (editions 51 to 66 –current edition).

I have served as referee for:

American Economic Review
International Economic Review
Journal of Human Resources
Economica
Journal of Public Economics
Quarterly Journal of Economics
Demography
National Science Foundation
National Tax Journal
Public Finance Quarterly

Journal of Labor Economics
Journal of Economics and Business
Economics of Education Review
Journal of Political Economy
Oxford Economic Papers
Journal of Income Distribution
Journal of Human Resources
Journal of Economic Literature
Journal of Income Distribution
Review of Income and Wealth
Journal of Population Economics
Economic Development and Cultural Change
Journal of Income Inequality