

# Koren M. Jo

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## EDUCATION AND CERTIFICATION

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<b>PhD</b>	Accounting Naveen Jindal School of Business, <i>University of Texas at Dallas</i> , Richardson, TX	2015
<b>MBA</b>	Accounting / Financial System Analytics Leonard N. Stern School of Business, <i>New York University</i> , New York, NY	2011
<b>BS</b>	Accounting / Communication Minor W.P. Carey School of Business, <i>Arizona State University</i> , Tempe, AZ. Barrett Honors College, <i>Magna Cum Laude</i>	2003
<b>CPA</b>	Certified Public Accountant, Arizona, USA (License # 15480-E)	Inactive

## PROFESSIONAL EXPERIENCE

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<b>W.P. Carey &amp; Co. LLC</b> , New York, NY – Analyst	May 2004 – July 2007
<ul style="list-style-type: none"><li>Preparation of quantitative and qualitative disclosures about market risk for 4 REITs including lease revenue, equity investment for the 10-Qs and 10-Ks<ul style="list-style-type: none"><li>– Cash Accountant</li></ul></li><li>Oversee cash entries for 3 REITs with combined asset of approx. 4 billion dollars</li></ul>	September 2003 – May 2004
<b>PricewaterhouseCoopers</b> , Phoenix, AZ – Tax Intern	January 2003- May 2003
<ul style="list-style-type: none"><li>Preparation of tax returns for middle market business entities and certain trusts</li></ul>	
<b>Ford Motor Company</b> , National – Dealership Owner 2 <sup>nd</sup> yr Trainee	May 2002 – December 2002
<ul style="list-style-type: none"><li>“<i>Improving Cash Flow Process for an Automotive Dealership: Design and Implementation</i>” (Individual research project)<ul style="list-style-type: none"><li>– Dealership Owner 1<sup>st</sup> yr Trainee</li></ul></li><li>Rotation through each department: audit, finance, inventory, parts, sales, service</li></ul>	May 2001 – August 2001
<b>Merrill Lynch</b> , Scottsdale, AZ – Intern	January 2002- May 2002
<ul style="list-style-type: none"><li>Analysis of client’s portfolios to produce recommendation</li></ul>	

## RESEARCH

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### Interests

Archival Financial Accounting; Aggregate Market; Geography; Hedge Fund Activism; Corporate Disclosure & Time Series

## Published Paper

- “Institutional Trading and Abel Noser Data” with Gang Hu, Yi Wang, and Jing Xie, Hong Kong Polytechnic University, *Journal of Corporate Finance*, October 2018.

## Working Papers

- “SEC Comment Letters on Firms’ Use of Non-GAAP Measures” with Yang Shuo, Hong Kong Polytechnic University
  - Under 4<sup>th</sup> round review at *Accounting Horizons*
- “Detailed financial forecasts in early-stage ventures: evidence from equity-based crowdfunding” with Yang Shuo, Hong Kong Polytechnic University
  - Under 2<sup>nd</sup> round review at *Journal of Accounting, Auditing and Finance*
  - Presented at 2018 Journal of Accounting, Auditing and Finance Conference, Jeju, Korea\*
- “Aggregate Earnings: Time-series Properties and Forecasting Models” with William Cready, University of Texas at Dallas
  - Under review at *The Accounting Review*
  - Presented at 2016 American Accounting Association Financial Accounting Reporting Section Midyear Meeting, Newport Beach, CA
  - Presented at 2015 American Accounting Association Annual Meeting, Chicago, IL
- “Financial Statement Comparability and Hedge Fund Activism” with C.S. Agnes Cheng, Jeffrey Ng, and Hong Wu, Hong Kong Polytechnic University
  - Presented at 2018 European Accounting Association Annual Congress, Milan, Italy
  - Presented at 2018 FMA Asia/Pacific Conference, Hong Kong
  - Presented at 2017 MIT Asia Accounting Conference, Hangzhou, China\*
  - Presented at 2017 International Finance and Banking Society Asia Conference, Ningbo, China\*
- “Geographic Dispersion and Restructuring Success” with Guang Ma, National University of Singapore; and Hong Wu, Hong Kong Polytechnic University
  - Presented at 2017 European Accounting Association Annual Congress, Valencia, Spain
  - Presented at 2015 Conference on Convergence of Financial and Managerial Accounting Research, Banff, Canada\*
- “Geographic Concentration and Agency Problems: Evidence from Hedge Fund Activism” with C.S. Agnes Cheng, Jeffrey Ng, and Hong Wu, Hong Kong Polytechnic University

\*Presented by co-author

## TEACHING

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### Course Teaching

Accounting for Managers, Graduate/MBA (HK PolyU)	Fall 2017 - Current
Intermediate Managerial Accounting (HK PolyU)	Fall 2015 - Fall 2016
Introductory Managerial Accounting (UT Dallas)	Spring 2013- Spring 2014

## UNIVERSITY SERVICES

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### Special Services

- Served as MC for “AF Knowledge Transfer Forum,” which hosted scholars from Harvard, Columbia and Berkeley University that was aired live on Tencent News with over 100,000 viewers on December 13<sup>th</sup>, 2018
- Served as MC for “PolyU 80th Anniversary- The D. H. Chen Foundation Nobel Laureate Lecture/ Research Workshop” by Prof. Prof. Robert Engle (2003 Nobel Laureate in Economic Sciences) on November 21st, 2017
- Served as MC for public lecture "Confronting Uncertainty in a Changing Environment" by Prof. Lars P. Hansen (2013 Nobel Laureate in Economic Sciences) on November 19<sup>th</sup>, 2015
- Served as MC for “Inaguration of the Center for Economic Sustainability and Entrepreneurial Finance” with keynote speaker: Prof. Sir James A. Mirrlees (1996 Nobel Laureate in Economic Sciences) on September 25<sup>th</sup>, 2015
- Voice recording as main voice for AF promotional videos of 5 different master’s programs (with Dr. David Broadstock and Dr. Gilbert Park)

### Committee Membership

- AF Tech Lab Director, Founder 2018 – Current
- AF Academy Co-Director 2016 – Current
- AF Service Council Member, Conference Organization & School Publicity Issues 2016 – Current
- FB School Promotion Team 2016 – 2018
- Recruiting Committee Member and Interviewer for Faculty at ‘Accounting PhD Rookie Recruiting and Research Camp’ in Miami, FL 2015 & 2016
- AF Capstone Project Presentation Judge 2015 – 2016
- IDEAS Nomination Committee 2015 – 2016
- Workshop Search Committee 2015 – 2016

## HONORS AND AWARDS

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AF Award for Outstanding Performance/Achievement in Teaching – Individual Category	2018-2019
AF Award for Outstanding Performance/Achievement in Teaching – Team Category	2018-2019
Hong Kong Institute of Chartered Secretaries Teaching Award of Merit	2018-2019 & 2017-2018
Jindal School of Management PhD Teaching Award – <i>Recipient</i>	2013-2014
Jindal School of Management PhD Teaching Award – <i>Acct. Dept. Nominee</i>	2012-2013
The University of Texas at Dallas Graduate Scholarship	2009-2014
New York University Graduate Scholarship	2007-2008
Arizona State University Helen B. Shipley Master of Taxation Scholarship	2003-2004
Arizona State University Regents Scholarship (Full Scholarship)	1999-2003
Arizona State University President’s Scholarship	1999-2003
Arizona State University Dean’s List	1999-2002

**GRANT RECEIVED**

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- [PI] 2017 Hong Kong Polytechnic University Central Research Grant for ECS Project 3.5 for “Should CEO and employee compensation disparity be reduced?” (HKD 105,000)
- [PI] 2016 Hong Kong Polytechnic University Central Research Grant for ECS Project 3.5 for “Negative persistence of other comprehensive income and changes in the market valuation of reclassified other comprehensive income” (HKD 105,000)
- [Co-I] 2015 Hong Kong Polytechnic University Central Research Grant for “Do Good Well and Social Venture Capital Platform (AF): A Proposal on Social Entrepreneurship and Innovation” (FB: HKD 500,000 + AF: HKD 100,000)
- [PI] 2015 Hong Kong Polytechnic University Start-up Fund for “Aggregate Earnings: Time-series Properties and Forecasting Models” (HKD 300,000)

**INTERNATIONAL CONFERENCE ATTENDANCE, PRESENTATION AND SERVICE**

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CARE Conference, Financial Regulation Effectiveness and the Role of Academic Research, Leesburg, VA 2019

MIT Asia Accounting Conference, Hong Kong 2018

Journal of Accounting, Auditing and Finance Conference, Jeju, Korea 2018 - Paper Presentation

European Accounting Association Annual Congress, Milan, Italy 2018 - Paper Presentation

FMA Asia/Pacific Conference, Hong Kong 2018 - Paper Presentation

MIT Asia Accounting Conference, Hangzhou, China 2017

European Accounting Association Annual Congress, Valencia, Spain 2017 - Paper Presentation

AAA Annual Meeting, New York, NY 2016

AAA FARS Midyear Meeting, Newport Beach, CA 2016 - Paper Presentation

AAA Annual Meeting, Chicago, IL 2015 - Paper Presentation

Conference on Convergence of Financial and Managerial Accounting Research, Banff, CN 2015 - Paper Presentation

AAA Annual Meeting, Georgia, AT, 2014 - Session Moderator

AAA IAS Midyear Meeting & Doctoral Consortium, St. Antonio, TX, 2014

AAA FARS Midyear Meeting & Doctoral Consortium, Houston, TX, 2014

AAA Annual Meeting, Anaheim, CA, 2013

AAA Annual Meeting, Washington, DC, 2012

AAA Annual Meeting, AAA FARS Section, and HARC Ad Hoc Referee

**PROFESSIONAL MEMBERSHIP**

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American Accounting Association

2001- Current

National Society of Collegiate Scholars

Lifetime