

Koren M. Jo

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EDUCATION AND CERTIFICATION

PhD	Accounting Naveen Jindal School of Business, <i>University of Texas at Dallas</i> , Richardson, TX	2015
MBA	Accounting / Financial System Analytics Leonard N. Stern School of Business, <i>New York University</i> , New York, NY	2011
BS	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
CPA	Certified Public Accountant, Arizona, USA (License # 15480-E)	Inactive

PROFESSIONAL EXPERIENCE

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

RESEARCH

Published Papers

- “SEC Comment Letters on Firms' Use of Non-GAAP Measures: The Determinants and Firms' Responses” with Shuo Yang, Hong Kong Polytechnic University, *Accounting Horizons*, June 2020.
- “Detailed Financial Forecasts in Early-Stage Ventures: Evidence from Equity-Based Crowdfunding” with Shuo Yang, Hong Kong Polytechnic University, *Journal of Accounting, Auditing and Finance*, Accepted.

- “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

- “Aggregate Earnings: Time-series Properties and Forecasting Models” with William Cready, University of Texas at Dallas
 - 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, Hong Kong Polytechnic University and Hong Wu, Fudan 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, Fudan 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*
- “Corporate Geographic Concentration and Hedge Fund Activism” with Frederik P. Schlingemann, University of Pittsburgh and Hong Wu, Hong Kong Polytechnic University
*Presented by co-author

TEACHING

Course Teaching

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

Teaching Awards

Hong Kong Institute of Chartered Secretaries Teaching Award of Merit	2018-2019 & 2017-2018
HK PolyU Accounting and Finance Dept. Award for Outstanding Performance in Teaching - <i>Individual Category</i>	2018-2019
HK PolyU Accounting and Finance Dept. Award for Outstanding Performance in Teaching - <i>Team Category (as team leader)</i>	2018-2019
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

UNIVERSITY SERVICES

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 13th, 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 19th, 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 25th, 2015
- Voice recording as main voice for AF promotional videos of 5 different master’s programs

Committee Services

- 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

INTERNATIONAL CONFERENCE ATTENDANCE, PRESENTATION AND SERVICE

AAA Annual Meeting, San Francisco, CA 2019

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

American Accounting Association	2001- Current
National Society of Collegiate Scholars	Lifetime