Jon M. Bakija

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Williams College
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EDUCATION

Ph.D. Economics, University of Michigan, Ann Arbor, MI. 2000.
M.A. Economics, University of Michigan, Ann Arbor, MI. 1995.
Non-degree part-time coursework in economics and mathematics, George Washington and American Universities, Washington, DC. 1991-1992.
B.A. Government, Wesleyan University, Middletown, CT. 1990.
honors: Phi Beta Kappa

FIELDS

Public Economics, Applied Econometrics, Labor Economics

PROFESSIONAL EXPERIENCE

Williams College. Williamstown, MA.
Associate Professor of Economics with tenure (July 2005 – present)
Assistant Professor of Economics (Fall 1999 – July 2005)
Taught courses including public economics, public economics for developing and transitional economies, public economics senior research seminar, political economy of public policy issues, tax policy for emerging markets, introductory economics, and principles of macroeconomics.

Cornell Law School. Ithaca, NY.
Visiting Associate Professor of Law (2007-2008)
Taught courses in Tax Policy and Federal Income Taxation

President's Advisory Panel on Federal Tax Reform, Washington DC
Staff economist, summer 2005. Participated in the development of two proposals for fundamental reform of the U.S. tax system. Played a major role in the designing a simple unified credit to replace the personal exemption, standard deduction, child credit, and earned income credit.

The Urban Institute, Washington DC
Consultant, 2005-present. Developed new federal and state tax modules for Dynasim and MINT policy microsimulation models.

Congressional Budget Office, Washington DC
Visiting Associate Analyst, 2003-2004

The Brookings Institution, Washington DC
Model-Okun Visiting Fellow in Economic Studies, 2002-2003

Office of Tax Policy Research, University of Michigan Business School. Ann Arbor, MI. Graduate Student Research Assistant, (1994-98). Conducted empirical research on the economics of taxation with Joel Slemrod, Director. Co-authored first edition a book on tax reform.

University of Michigan, Department of Economics. Writing Instructor for undergraduate senior seminar for honors economics majors; graduate student instructor, introductory macroeconomics.

The Urban Institute. Washington, DC. Research Associate (1993). Research Assistant (1990-92). Conducted research on a wide variety of public policy issues, including Social Security, taxation, health care, poverty, disability, and the Federal budget, with Eugene Steuerle, Senior Fellow. Co-authored a book on Social Security reform.

PUBLICATIONS

Books

Taxing Ourselves: A Citizen's Guide to the Great Debate over Tax Reform, with Joel Slemrod. Cambridge, MA: MIT Press, 1996. 2nd edition published 2000; Japanese translation published 2003; 3rd edition published 2004; 4th edition published 2008.

Retooling Social Security for the 21st Century, with Eugene Steuerle. Washington DC: The Urban Institute Press, 1994.

Articles, Reports, and Contributions to Edited Volumes

"Charitable Bequests and Taxes on Inheritances and Estates: Aggregate Evidence from across States and Time," (with William Gale and Joel Slemrod), *American Economic Review Papers and Proceedings*, Vol. 93, No. 2, May 2003, pp. 366-370.

"Charitable Giving and the Estate Tax." (with William Gale). *Tax Notes*, Dec. 8, 2003, p. 1233.

"Effects of Estate Tax Reform on Charitable Giving." (with William Gale). *Tax Notes*. June 23, 2003, p. 1841. (also released as Urban–Brookings Tax Policy Center *Issues and Options* Paper No. 6, July 2003).

"Growing Inequality and Decreased Tax Progressivity" (with Joel Slemrod) in Kevin Hassett, ed., *Inequality and Tax Policy*. Washington, DC: American Enterprise Institute Press, 2001. (earlier draft was released as "Does Growing Inequality Reduce Tax Progressivity? Should It?",NBER Working Paper No. 7576, March 2000).

"An Overview of the U.S. Tax System." (with Joel Slemrod) in W. Bartley Hildreth and James A. Richardson, eds. *Handbook on Taxation*. New York: Marcel Dekker, Inc., 2000.

"Retooling Social Security for the 21st Century." (with Eugene Steuerle) *Social Security Bulletin*. Vol. 60, No. 2 (summer): 37-60, 1997.

"How Social Security Redistributes Income." (with Eugene Steuerle) in Richard Thau and Jay Heflin, eds. *Generations Apart*. Amherst, NY: Prometheus Press, 1997.

"Social Security Disability Insurance: Fiscal Imbalance and Lifetime Value." (with Eugene Steuerle) Urban Institute Project Report. Washington, DC: The Urban Institute, 1993.

"Individual Income Taxation Since 1948." (with Eugene Steuerle) *National Tax Journal*, Vol. XLIV, No. 4, Part 2, (December), pp. 451-475, 1991.

Working Papers

"How Does Charitable Giving Respond to Incentives and Income? Dynamic Panel Estimates Accounting for Predictable Changes in Taxation" (with Bradley Heim). NBER Working Paper No. 14237, Aug. 2008. (Under review at *National Tax Journal*).

"Documentation for a Comprehensive Historical U.S. Federal and State Income Tax Calculator Program." Williams College, working paper, 2008.

"Do the Rich Flee from High State Taxes? Evidence from Federal Estate Tax Returns" (with Joel Slemrod). Revise/resubmit invited at *Journal of Public Economics*. Earlier version available as *NBER Working Paper* No. 10645, July 2004.

"Distinguishing Transitory and Permanent Price Elasticities of Charitable Giving with Pre-Announced Changes in Tax Law." (an earlier draft of this paper was entitled "Consistent Estimation of Transitory and Permanent Price and Income Elasticities: The Case of Charitable Giving") Revise/resubmit invited at the *Journal of Public Economics.*

"The Effect of Taxes on Portfolio Choice: Evidence from Panel Data Spanning the Tax Reform Act of 1986." Revise / resubmit invited at *National Tax Journal*.

"Tax Incentives and the Charitable Giving of High-Income People: Evidence from State Panel Data" (presented at January 2007 American Economic Association Meetings, Williams College and Cornell Law School)

"Timing vs. Long-run Charitable Giving Behavior: Reconciling Divergent Approaches and Estimates," with Rob McClelland (presented at January 2005 American Economic Association Meetings).

"New Evidence on the Effects of Taxes on Charitable Bequests" with William Gale and Joel Slemrod (presented at January 2005 American Economic Association Meetings and Colby College).

Work in Progress

"Taxes and State-to-State Migration" (to be presented at 2009 American Economic Association meetings).

" The Impact of Taxes on Charitable Bequests: Microeconometric Evidence across States and Time" (with Bill Gale).

"Taxation, Wealth Accumulation, and Bequests: Evidence from State Tax Variation" (with Wojciech Kopczuk).

PRESENTATIONS OF RESEARCH AND DISCUSSANT SERVICE AT SEMINARS AND CONFERENCES

2008: NBER Conference on Tax Expenditures, Conference on Empirical Legal Studies, Williams College Economics Department
2007: American Economic Association Meetings, Williams College Economics Department, Williams College Oakley Center Lunch, Cornell Law School, National Bureau of Economic Research pre-conference on Tax Expenditures, Conference on Empirical Legal Studies (discussant)
2006: National Tax Association Meetings
2005: American Economic Association meetings, Colby College Economics Department
2004: University of New Hampshire Economics Department Seminar, University of Michigan Public Finance Seminar
2003: American Economic Association meetings (discussant), Wesleyan University Economics Department Seminar, College of William and Mary Economics Department Seminar
2002: Harvard / MIT joint Public Economics Seminar, Williams College Economics Department Seminar, Brookings Institution Economic Studies Work in Progress Seminar, University of Virginia Public Economics Seminar, University of California – Berkeley Public Economics Seminar.
2001: American Economic Association meetings (discussant), National Bureau of Economic Research Summer Institute
2000: Williams College Economics Department Seminar
1999: U. of Michigan, U. of Kentucky, Williams College, Binghamton U., U. of Tennessee, Congressional Budget Office, U.S. Dept. of Treasury Office of Tax Analysis, World Bank, American Enterprise Institute, Urban Institute.

SERVICE

Williams College

2008-2009:
- *Ad hoc* committee on faculty housing policies
- Economics department computer coordinator

2005-2006:
- Honorary Degrees committee
- Economics department research director. Organized three departmental seminar series and ran the senior honors program.
- Economics department curriculum committee. Helped develop a proposal to re-design the economics major. This included fundamental changes to the senior seminar in economics, the econometrics requirement, and the honors program.
- Gave talk on Social Security reform to Williams College alumni association in Washington DC.

2004-2005:
- Honorary Degrees committee
- Department of Economics study abroad coordinator
- Economics department curriculum committee
- Political Economy program advisory committee
- Moderated public debate on Social Security reform between Peter Orszag and Laurence Kotlikoff at Williams College.

- Gave talk on Social Security reform for parent's weekend at Williams College.

2003-2004:
- Economics department graduate advisor. Consulted with students regarding graduate school plans and employment opportunities. Built a web page with links to resources for students interested in jobs related to public policy.
- Honorary Degrees Committee. Attended meetings to discuss potential speakers and honorees for commencement and other similar occasions, contributed to list of suggested speakers/honorees.

2002-2003:
- Economics Department, Economics 120 Coordinator. Developed new course structure, consulted with macro faculty on curriculum, shared materials with subsequent instructors.
- Economics Department Curriculum Committee. Contributed to report on departmental response to curricular innovation initiative.

2001-2002:
- Economics Department, Director of Research. Coordinated honors program and advised all economics senior thesis writers, organized departmental seminars and Class of 1960 Scholars outside speaker series, coordinated summer research assistants, managed departmental working paper series.
- Economics Department, Economics 101 Coordinator. Re-designed the course syllabus and reading list, provided assistance to other instructors of Economics 101 during both semesters.
- Economics Department Curriculum Committee. Participated in all committee meetings and helped draft a proposal to overhaul the Economics curriculum, including changing introductory economics from a one-course to a two-course sequence. The proposal was adopted almost in its entirety.
- Center for Development Economics Admissions Interviewer (June 2001). Traveled to Uganda, Kenya, and Tanzania for two weeks. Interviewed 30 applicants to the Center for Development Economics master's program, promoted the program to supervisors and government officials responsible for training funds, met with groups of alumni, and gathered opinions and suggestions on how well the CDE curriculum meets the needs of graduates in their subsequent careers in government service.

AWARDS AND GRANTS

2002-2003 Model-Okun Early Career Fellowship in Economic Studies at the Brookings Institution

Summer research grant, Williams College Henry George fund, 2002

Summer research grant, Williams Project on the Economics of Higher Education, 2000

Office of Tax Policy Research research assistantship, 1995-1998.

Retooling Social Security for the 21st Century selected as an "Outstanding Academic Book of 1994" by *Choice* (an academic library journal).

Grants from the Bradley Foundation and the American Association of Retired Persons for the study of Social Security, 1992-93.

Phi Beta Kappa, Wesleyan University, 1990.

MEMBERSHIPS

American Economics Association, National Tax Association, Society for Empirical Legal Studies

REFEREE REPORTS AND REVIEWS OF MANUSCRIPTS

2008: Oxford University Press, Journal of Regional Science, Economic Inquiry, Journal of Public Economics, Journal of Empirical Legal Studies
2007: Smith Richardson Foundation, National Tax Journal, Journal of Economic Education, Contemporary Economic Policy, Public Finance Review
2006: Quarterly Journal of Economics, American Economic Review, International Tax and Public Finance, National Tax Journal, Worth Publishers, Public Finance Review
2005: Journal of Public Economics, Journal of Population Economics, National Tax Journal, Journal of Income Distribution
2004: National Tax Journal, Journal of Income Distribution
2003: Journal of Public Economics, Economic Inquiry, Economic Modeling, National Tax Journal, Robert Wood Johnson Foundation, Urban Institute Press
2002: National Tax Journal
2000: Journal of Human Resources, National Tax Journal, Journal of Economic Behavior and Organization, Westview Press
1999: Journal of Public Economics, National Tax Journal
1998: National Tax Journal, Cambridge University Press