JAMES MICHAEL POTERBA
Department of Economics, E52-373
Massachusetts Institute of Technology
Cambridge, MA 02142-1347

Personal Information:

Born:	July 13, 1958 (New York, NY)
Married:	Nancy Lin Rose (1984)
Children:	Matthew (1989), Timothy (1991), Margaret (1994)
Home:	17 Stults Road, Belmont MA 02478-3428

Education:

D.Phil. (Economics) Oxford, June 1983
M.Phil. (Economics) Oxford, June 1982
A.B. (Economics, Summa Cum Laude) Harvard College, June 1980

Employment:

2006-:	Department Head, MIT Economics Department
2006-:	Trustee, College Retirement Equity Fund (TIAA-CREF)
1988-:	Professor of Economics, MIT
2001-2006:	Associate Department Head, MIT Economics Department
1991-:	Director, NBER Public Economics Research Program
1994-2000:	Associate Department Head, MIT Economics Department
1989-91:	Associate Director, NBER Taxation Research Program
1988:	CRSP Visiting Professor of Finance, University of Chicago GSB
1986-8:	Associate Professor of Economics, MIT
1983-6:	Assistant Professor of Economics, MIT
1982-3:	Junior Research Fellow, Nuffield College, Oxford
1982:	Instructor in Economics, MIT

Editorial Positions:

Advisory Board, Retirement Income Review (2002-)
Advisory Board, Journal of Wealth Management (1998-)
Editor, Journal of Public Economics (1998 -2006)
Advisory Board, Journal of Investment Consulting (1998-2005)
Associate Editor: Regional Science & Urban Economics
Associate Editor, Review of Economics & Statistics (1993-2002)
Co-Editor: Journal of Public Economics (1995 - 1997)
Co-Editor: RAND Journal of Economics (1986 - 1995)
Associate Editor, Journal of Finance (1988 - 2000)

Fellowships & Honors:

2005:	EFACT Honorary Award, Tilburg University
2004-6:	TIAA-CREF Institute Fellow

2004: Certificate of Excellence, Paul Samuelson Prize, TIAA-CREF
2003: CES Distinguished Fellow, University of Munich
2003: Honorable Mention, Culp-Wright Book Award, American Risk and Insurance Association
2002: MIT Graduate Economics Association Teacher of the Year
2002: American Council on Capital Formation, Distinguished Scholar
2001-3: Executive Committee, American Economics Association
2000-1: George and Karen McCown Distinguished Visiting Fellow, Hoover Institution
2000: Duncan Black Prize, Public Choice Society
1999: National Academy of Sciences Award for Scientific Reviewing
1996-: Mitsui Professor of Economics, MIT
1996: Certificate of Excellence, Paul Samuelson Prize, TIAA-CREF
1996-: Fellow, American Academy of Arts and Sciences
1993-4: Fellow, Center for Advanced Study in Behavioral Sciences
1993-5: Director, American Finance Association
1992-: Fellow, National Academy of Social Insurance
1992-3: Senior Fellow, Institute for Policy Reform
1990,93,95: MIT Economics Department Teacher of the Year
1988-: Fellow, Econometric Society
1988: Alfred P. Sloan Fellowship
1986: James L. Barr Award
1986: Batterymarch Financial Fellowship
1985-: Research Associate, NBER
1982-5: Faculty Research Fellow, NBER
1982: George Webb Medley M.Phil. Thesis Prize
1980-3: Marshall Scholarship
1980: John Williams Prize, Harvard College (outstanding Economics major)
1979: Phi Beta Kappa

Invited Lectures:

2006: AEA/AFA Joint Luncheon Lecturer
2005: Elder Law Journal Lecture, University of Illinois
2003: Hahn Lecturer, Royal Economic Society
2003: Marsh & McLennan Lecture, Furman University
2003: Munich Lectures, Center for Economic Studies
2002: Watson-Wyatt Lecture, City University of London
2001: David Kinley Lecture, University of Illinois
2000: Institute for Fiscal Studies Lecturer, London
2000: Review of Economics and Statistics Lecturer, Harvard University
1996: Woytinsky Lecture, University of Michigan

Other Professional Activities:

2006-: Member, MIT Advisory Committee on Shareholder Responsibility
2006-: Economics Advisory Panel, Congressional Budget Office
2005-: Advisory Board, Stanford Institute for Economic Policy Research
2004-: Honors and Awards Committee, American Economics Association (Chair, 2006-)
2005: Panel Member, President's Advisory Panel on Federal Tax Reform

2005:	Selection Committee, TIAA-CREF Samuelson Award Selection Committee
2004-5:	Chairman, Curriculum Advisory Panel, Investment Management Consultants Assn.
2004:	Nominating Committee, American Economics Association
2004:	Economics Visiting Committee, University of California – Berkeley
2004:	Program Committee, American Finance Association
2003:	New York Stock Exchange Options Voting Committee
2003-5:	Chair, American Academy of Arts and Sciences, Class III:2 Membership Committee
2003-5:	Academic Advisory Panel, Federal Reserve Bank of New York
2003:	Audit Committee, American Economic Association
2001, 2004:	Program Committee, American Economic Association
2000-1:	Association for Investment Management & Research (AIMR), After-Tax Reporting Subcommittee
1999-2005:	Member, MIT 401(k) Plan Oversight Committee
1997-2001:	Trustee, MIT Retirement Plan for Staff Members
1997:	Committee on Nominating Procedures, American Economic Association
1997-8:	American Academy of Arts and Sciences, Class III:2 Nominating Committee
1996, 2000:	National Science Foundation, Economics Program Committee of Visitors
1996-2001:	AIMR, Committee on Education & Research
1995-7:	National Institute of Health, Social Science Study Section Member
1995:	Academic Review Panel, Princeton University
1995-2004:	Economics Advisory Panel, Congressional Budget Office
1994:	National Academy of Social Insurance, Chair, Research Committee
1994-8:	National Research Council: Science, Technology, & Economic Policy Board
1994, 1997:	Program Committee, American Finance Association
1994, 2003:	Program Committee, International Institute of Public Finance
1994-5:	Nominating Committee, American Economic Association
1993-4:	Program Committee, American Economic Association
1993-:	Research Advisory Board, American Council on Capital Formation
1993:	Advisor to Massachusetts Special Commission on Business Tax Policy
1993-:	Program Board, MIT Center for Energy and Environmental Policy Research
1992:	Program Committee Chair, Econometric Society Winter Meeting
1990-2:	NSF Economics Review Panel
1990:	Nominating Committee, American Finance Association
1988-9:	Program Committee, American Finance Association
1988,1990:	Program Committee, Econometric Society Winter Meeting

Publications in Journals:

1. "The Price of Popularity: The Political Business Cycle Reexamined," American Journal of Political Science 24 (1980), 696-714. (with D. Golden).

2. "Multiple Shooting in Rational Expectations Models," Econometrica 50 (1982), 1329-1333. (with D. Lipton, J. Sachs, and L. Summers).

3. "The Effective Tax Rate and the Pretax Rate of Return," Journal of Public Economics 21 (1983), 129-157. (with M. Feldstein and L. Dicks-Mireaux).

4. "Dividend Taxes, Corporate Investment, and 'Q'," Journal of Public Economics 22 (1983), 135-167. (with L. Summers).

5. "Response Variation in the CPS: Caveats for Unemployment Analysts," Monthly Labor Review, March 1984,37-43. (with L. Summers)

6. "Unemployment Insurance and Reservation Wages," Journal of Public Economics 23 (1984), 141-169. (with M. Feldstein).

7. "Tax Subsidies to Owner-Occupied Housing: An Asset Market Approach," Quarterly Journal of Economics 99 (1984), 729-745. (reprinted in Elgar Reference Series, The Economics of Housing, Volume 2, 1997).

8. "New Evidence that Taxes Affect the Valuation of Dividends," Journal of Finance 39 (1984), 1397-1415. (with L. Summers)

9. "The Market Value of Cash Dividends: The Citizens Utilities Case Reconsidered," Journal of Financial Economics 15 (1986), 395-405.

10. "A Tax Based Test of Nominal Rigidities," American Economic Review 76 (September 1986), 659-675. (with J. Rotemberg and L. Summers).

11. "Reporting Errors and Labor Market Dynamics," Econometrica 54 (November 1986), 1319-1338. (with L. Summers).

12. "The Persistence of Volatility and Stock Market Fluctuations," American Economic Review 76 (December 1986), 1142-1151. (with L. Summers).

13. "Tax Evasion and Capital Gains Taxation," American Economic Review 77 (May 1987), 234-239.

14. "Household Behavior and the Tax Reform Act of 1986," Journal of Economic Perspectives 1 (Summer 1987), 101-119. (with J. Hausman)

15. "Finite Lifetimes and the Effects of Budget Deficits on National Savings," Journal of Monetary Economics 20 (September 1987), 369-392. (with L. Summers)

16. "How Burdensome are Capital Gains Taxes? Evidence from the United States," Journal of Public Economics 33 (July 1987), 157-172.

17. "Tax Policy and Corporate Saving," Brookings Papers on Economic Activity 1987:2, 454-504.

18. "Are Consumers Forward Looking? Evidence from Fiscal Experiments," American Economic Review 78 (May 1988), 413-418.

19. "Mean Reversion in Stock Prices: Evidence and Implications," Journal of Financial Economics 22 (October 1988), 27-60 (with L. Summers).

20. "A Manufacturing Perspective on National Economic Policy," Harvard Business Review 66 (November 1988), 76-80. (with R. Dornbusch and L. Summers)

21. "Lifetime Incidence and the Distributional Burden of Excise Taxes," American Economic Review 79 (May 1989), 325-330. (reprinted in A. Auerbach, ed., Public Finance: Worth Series in Outstanding Contributions (New York: Worth Publishers, 1999).

22. "What Moves Stock Prices?," Journal of Portfolio Management 15 (Spring 1989), 4-12. (with D. Cutler and L. Summers).

23. "Second Mortgages and Household Saving," Regional Science and Urban Economics 19(1989), 325-346. (with J. Manchester)

24. "Capital Gains Tax Policy Toward Entrepreneurship," National Tax Journal 42 (September 1989), 375-390.

25. "Tax Reform and the Market for Tax-Exempt Debt," Regional Science and Urban Economics 19 (1989), 537-562.

26. "Inflation, Taxation, and Optimizing Governments," Journal of Money, Credit, and Banking 22 (1990), 1-18. (with J. Rotemberg)

27. "Speculative Dynamics and the Role of Feedback Traders," American Economic Review 80 (May 1990), 68-72. (with D. Cutler and L. Summers)

28. "An Aging Society: Challenge or Opportunity?," Brookings Papers on Economic Activity 1990:1, 1-74. (with D. Cutler, L. Sheiner, and L. Summers).

29. "Japanese and U.S. Cross-Border Common Stock Investments," Journal of Japanese and International Economies 4 (1990), 476-493. (with K. French).

30. "Comparing the Cost of Capital in the United States and Japan: A Survey of Methods," Federal Reserve Bank of New York Quarterly Bulletin (Winter 1991), 20-32.

31. "Investor Diversification and International Equity Markets," American Economic Review 81 (May 1991), 222-226. (with K. French).

32. "Speculative Dynamics," Review of Economic Studies 58 (May 1991), 529-546. (with D. Cutler and L. Summers)

33. "Were Japanese Stock Prices Too High?," Journal of Financial Economics 29 (October 1991), 337-364. (with K. French)

34. "Which Households Own Municipal Bonds? Evidence from Tax Returns," National Tax Journal 44 (December 1991), 93-103. (with D. Feenberg)

35. "House Price Dynamics," Brookings Papers on Economic Activity 1991:2, 143-203.

36. "Demographics and House Prices: The Canadian Evidence," Regional Science and Urban Economics 21 (December 1991), 539-546. (with G. Engelhardt)

37. "Taxation and Housing: Old Questions, New Answers," American Economic Review 82 (May 1992), 237-242.

38. "Global Warming: A Public Finance Perspective," Journal of Economic Perspectives 7 (Fall 1993), 47-63.

39. "Targeted Retirement Saving and the Net Worth of Elderly Americans," American Economic Review 84 (May 1994), 180-185. (with S. Venti and D. Wise)

40. "A Skeptic's View of Global Budget Caps," Journal of Economic Perspectives 8 (Summer 1994), 67-73.

41. "Tax Incentives and the Demand for Health Insurance: Evidence from the Self-Employed," Quarterly Journal of Economics 109 (August 1994), 701-733. (with J. Gruber)

42. "State Responses to Fiscal Crises: The Effects of Budgetary Institutions and Politics," Journal of Political Economy 102 (August 1994), 799-821.

43. "Lawrence H. Summers: 1994 John Bates Clark Medalist," Journal of Economic Perspectives 9 (Winter 1995), 165-182.

44. "Capital Budgets, Borrowing Rules, and State Capital Spending," Journal of Public Economics 56 (January 1995), 165-187.

45. "Money, Output, and Prices: Evidence from a New Monetary Aggregate," Journal of Business and Economic Statistics 13 (January 1995), 67-83. (with J. Driscoll and J. Rotemberg)

46. "The Effect of Property Tax Limits on Wages and Employment in the Local Public Sector," American Economic Review 85 (May 1995), 384-389. (with K. Rueben)

47. "Environmental Taxes on Intermediate and Final Goods When Both Can Be Imported," International Tax and Public Finance 2 (1995), 219-226. (with J. Rotemberg)

48. "Unemployment Benefits and Labor Market Transitions: A Multinomial Logit Model with Errors in Classification," Review of Economics and Statistics 77 (May 1995), 207-216. (with L. Summers)

49. "Balanced Budget Rules and Fiscal Policy: Evidence from the States," National Tax Journal 48 (September 1995), 329-338.

50. "Do 401(k) Contributions Crowd Out Other Private Saving?," Journal of Public Economics 58 (September 1995), 1-32. (with S. Venti and D. Wise)

51. "Survey Evidence on Employer Match Rates and Employee Saving Behavior in 401(k) Plans," Economics Letters 49 (1995), 313-317. (with L. Papke)

52. "A CEO Survey of U.S. Companies' Time Horizons and Hurdle Rates," Sloan Management Review 37 (Fall 1995), 43-53. (with L. Summers)

53. "Stock Ownership Patterns, Stock Market Fluctuations, and Consumption," Brookings Papers on Economic Activity 1995:2, 295-357. (with A. Samwick)

54. "Retail Price Reactions to Changes in State and Local Sales Taxes," National Tax Journal 49 (June 1996), 169-179.

55. "Budget Institutions and Fiscal Policy in the U.S. States," American Economic Review 86 (May 1996), 395-400.

56. "How Retirement Saving Programs Increase Saving," Journal of Economic Perspectives 10 (Fall 1996), 91-112. (with S. Venti and D. Wise) (substantially reprinted as "Les Programmes d'Epargne Retraite," Risques (Juillet-Septembre 1996), 81-102).

57. "The Impact of Fundamental Tax Reform on Employer-Provided Health Insurance," Insurance Tax Review (July 1996), 1-5. (with Jonathan Gruber)

58. "Demographic Structure and the Political Economy of Public Education," Journal of Public Policy and Management 16 (January 1997), 48-66.

59. “401(k) Plans and Future Patterns of Retirement Saving,” American Economic Review 88 (May 1998), 179-184. (with S. Venti and D. Wise)

60. “Demographic Change, Intergenerational Linkages, and Public Education,” American Economic Review 88 (May 1998), 315-320.

61. “Public Finance and Public Choice,” National Tax Journal 51 (June 1998), 391-396. (reprinted in J. Slemrod, ed., Tax Policy in the Real World (Cambridge: Cambridge University Press, 1999).

62. “Economists Views About Parameters, Values, and Policies: Survey Results in Labor and Public Economics, Journal of Economic Literature 36 (September 1998), 1387-1425. (with V. Fuchs and A. Krueger).

62. “The Rate of Return to Corporate Capital and Factor Shares: New Estimates Using Revised National Income Accounts and Capital Stock Data,” Carnegie-Rochester Conference Series on Public Policy 48 (June 1998), 211-246.

63. “Estate Tax Avoidance by High Net Worth Households: Why Are There So Few Tax Free Gifts?” Journal of Private Portfolio Management 1 (Summer 1998), 1-9.

64. "Congressional Distributive Politics and State Economic Performance," Public Choice 99 (April 1999), 185-216. (with S. Levitt).

66. “Unrealized Capital Gains and the Measurement of After-Tax Portfolio Performance,” Journal of Private Portfolio Management 1 (Spring 1999), 23-34.

67. "Taxing Retirement Income: Nonqualified Annuities and Distributions from Qualified Accounts," National Tax Journal 52 (September 1999), 563-586. (with J. Brown, O. Mitchell, and M. Warshawsky)

68. "New Evidence on the Money's Worth of Individual Annuities," American Economic Review 89 (December 1999), 1299-1318. (with O. Mitchell, M. Warshawsky, and J. Brown)

69. "Stock Market Wealth and Consumption," Journal of Economic Perspectives 14 (Spring 2000), 99-118.

70. "Saver Behavior and 401(k) Retirement Wealth," American Economic Review 90 (May 2000), 297-302. (with S. Venti and D. Wise).

71. "The Income and Tax Share of Very High Income Households, 1960-1995," American Economic Review 90 (May 2000), 264-270. (with D. Feenberg).

72. "The Distribution of Payroll and Income Tax Burdens, 1979-1999," National Tax Journal 53 (September 2000), 765-794. (with A. Mitrusi)

73. "Joint Life Annuities and Annuity Demand by Married Couples," Journal of Risk and Insurance 67 (December 2000), 527-554. (with J. Brown)

74. "Five Prescriptions for Tax-Efficient Investing," Journal of Investment Consulting 3 (December 2000), 18-24.

75. "Capital Gains Tax Rules, Tax Loss Trading, and Turn-of-the-Year Returns," Journal of Finance 56 (February 2001), 353-368. (with S. Weisbenner)

76. "Estate and Gift Taxes and Incentives for Inter Vivos Giving in the United States," Journal of Public Economics 79 (January 2001), 237-264.

77. "Demographic Structure and Asset Returns," Review of Economics and Statistics 83 (November 2001), 565-584.

78. "Fiscal News, State Budget Rules, and Tax-Exempt Bond Yields," Journal of Urban Economics 50 (2001), 537-562. (with K. Rueben)

79. "Selection Effects in the United Kingdom Individual Annuities Market," Economic Journal 112 (January 2002), 28-50. (with A. Finkelstein)

80. "Do After-Tax Returns Affect Mutual Fund Inflows?" Journal of Financial Economics 63 (March 2002), 381-414. (with D. Bergstresser)

81. "Exchange Traded Funds: A New Investment Option for Taxable Investors," American Economic Review 92 (May 2002), 422-427. (with J. Shoven)

82. "Recent Developments in and Future Prospects for Public Economics," American Economist 46 (Fall 2002), 20-30. (reprinted in M. Szenberg and L. Ramrattan, eds., Shifting Paradigms: New Frontiers in Economics, Cambridge: Cambridge University Press, 2004, 185-202.).

83. "The Third Decade of the Journal of Public Economics," Journal of Public Economics 86 (December 2002), 307-310. (with R. Gordon)

84. "Taxation and Household Portfolio Composition: Evidence from Tax Reforms in the 1980s and 1990s," Journal of Public Economics 87 (January 2003), 5-39. (with A. Samwick)

85. “An Interview with Martin Feldstein,” Macroeconomic Dynamics 7 (April 2003), 291-312.

86. “Inter-Asset Differences in Effective Estate Tax Rates,” American Economic Review 93 (May 2003), 360-365. (with S. Weisbenner)

87. “Employer Stock and Retirement Saving Accounts,” American Economic Review 93 (May 2003), 398-404.

88. "Adverse Selection in Insurance Markets: Policyholder Evidence from the U.K. Annuity Market," Journal of Political Economy 112 (February 2004), 183-208. (with A. Finkelstein)

89. “Portfolio Risk and Self-Directed Retirement Saving Programs,” Economic Journal 114 (March 2004), C26-C51.

90. “Taxation and Corporate Payout Policy,” American Economic Review 94 (May 2004), 171-175.

91. "Asset Allocation and Asset Location: Household Evidence from the Survey of Consumer Finances," Journal of Public Economics 88 (August 2004), 1893-1916. (with D. Bergstresser)

92. “Valuing Assets in Retirement Saving Accounts,” National Tax Journal 57 (June 2004), 489-512.

93. “The Alternative Minimum Tax and Effective Marginal Tax Rates,” National Tax Journal 57 (June 2004), 407-427. (with Daniel Feenberg)

94. "Copycat Funds: Information Disclosure Regulation and the Returns to Active Management in the Mutual Fund Industry," Journal of Law and Economics (October 2004), 515-541. (with M. Frank, D. Shackelford, and J. Shoven)

95. “Steven D. Levitt: 2004 John Bates Clark Medalist,” Journal of Economic Perspectives 19 (2005), 181-198.

96. “Tax Loss Trading by Individual Investors,” American Economic Review 95 (2005), 1605-1630. (with Zoran Ivkovic and Scott Weisbenner)

97. “Individual Decision-Making and Risk in Defined Contribution Pension Plans,” Elder Law Journal 13 (2005), 285-308.

Other Publications:

1. "The United Kingdom," in M. King and D. Fullerton, The Taxation of Income from Capital (Chicago: University of Chicago Press, 1984), 31-96. (with M. King and M. Naldrett).

2. "The Economic Effects of Dividend Taxation," in E. Altman and M. Subrahmanyam, eds., Recent Advances in Corporate Finance (Homewood, IL: Dow Jones-Irwin Publishing, 1985), 227-284. (with L. Summers)

3. "Explaining the Yield Spread Between Taxable and Tax-Exempt Bonds: The Role of Expected Future Tax Policy," in H.S. Rosen, ed., Studies in State and Local Public Finance (Chicago: University of Chicago Press, 1986), 5-49.

4. "Adjusting the Gross Changes Data: Implications for Labor Market Dynamics," in Proceedings of the Conference on Gross Flows in Labor Force Statistics (Washington: U.S. Bureau of the Census, 1985), 81-96. (with L. Summers)

5. "Public Policy Implications of Declining Old Age Mortality," in G. Burtless, ed., Work, Health, and Income Among the Elderly (Washington: Brookings Institution, 1986), 19-59. (with L. Summers)

6. "Tax Loss Carryforwards and Corporate Tax Incentives," in M. Feldstein, ed., The Effects of Taxes on Capital Accumulation (University of Chicago Press, 1987), 305-337. (with A. Auerbach)

7. "Money in the Utility Function: An Empirical Investigation," in W. Barnett and K. Singleton, New Approaches to Monetary Economics (Cambridge: Cambridge University Press, 1987), 219-240. (with J. Rotemberg)

8. "Why Have Corporate Tax Revenues Declined?" in L. Summers, ed., Tax Policy and the Economy (Cambridge: MIT Press, 1987), 1-29. (with A. Auerbach)

9. "Tax Reform and Residential Investment Incentives," in Proceedings of the 79th Annual Meeting of the National Tax Association-Tax Institute of America, 1987, 112-119.

10. "International Evidence on the Predictability of Stock Returns," in Proceedings of the CRSP Seminar on the Analysis of Security Prices (Chicago: CRSP, November 1988), 97-126. (With D. Cutler and L. Summers)

11. "Venture Capital and Capital Gains Taxation," in L. Summers, ed., Tax Policy and the Economy vol. 3 (Cambridge: MIT Press, 1989), 47-67.

12. "Dividends, Capital Gains, and the Corporate Veil: Evidence from Britain, Canada, and the United States," in D. Bernheim and J. Shoven, eds., National Saving and Economic Performance (Chicago: University of Chicago Press, 1990), 49-71.

13. "Tax Policy Toward Housing: Preliminary Evidence on the Effects of Recent Tax Reforms," in J. Slemrod, ed., Do Taxes Matter? The Impact of the Tax Reform Act of 1986 (Cambridge, MIT Press, 1990), 141-161.

14. "Debt and Deficits in the 1990s," in J. Makin, N. Ornstein, and D. Zlowe, eds., Balancing Act: Debt, Deficits, and Taxes (Washington: American Enterprise Institute, 1990), 1-42. (with R. Dornbusch)

15. "Is the Gasoline Tax Regressive?," in D. Bradford, ed., Tax Policy and the Economy 5 (1991), 145-164.

16. "Tax Policy Toward Global Warming: On Designing a Carbon Tax," in R. Dornbusch and J. Poterba, eds., Economic Policy Responses to Global Warming (Cambridge: MIT Press, 1991), 71-97.

17. "Taxation and Housing Markets," in J. Shoven and J. Whalley, eds., Canada-U.S. Tax Comparisons (Chicago: University of Chicago Press, 1992), 275-295.

18. "Why Didn't the Tax Reform Act of 1986 Raise Corporate Taxes?" in J. Poterba, ed., Tax Policy and the Economy 6 (1992), 43-58.

19. “Mean Reversion,” in P. Newman, M. Milgate, and J. Eatwell, eds., The New Palgrave Dictionary of Money and Finance (New York, Stockton Press, 1992), 680-681.

20. “Municipal Bonds,” in P. Newman, M. Milgate, and J. Eatwell, eds., The New Palgrave Dictionary of Money and Finance (New York, Stockton Press, 1992), 830-831.

21. "Tax Reform and the Housing Market in the Late 1980s: Who Knew What, and When Did They Know It?" in Lynn E. Browne and Eric S. Rosengren, eds., Real Estate and the Credit Crunch (Boston: Federal Reserve Bank of Boston, 1993), 230-251.

22. "Income Inequality and the Incomes of High-Income Taxpayers: Evidence from Tax Returns," in J. Poterba, ed., Tax Policy and the Economy 7 (1993), 145-173. (with D. Feenberg)

23. "Government Incentives for Household Saving in the United States," in J. Poterba, ed., Public Policies and Household Saving (Chicago: University of Chicago Press, 1994), 1-18.

24. "American Fiscal Policy in the 1980s," in M. Feldstein, ed., American Economic Policy in the 1980s (Chicago: University of Chicago Press, 1994), 235-270.

25. "Public Policy Toward Housing: The U.S. Experience," in Y. Noguchi and J. Poterba, eds., Housing Markets in the United States and Japan (Chicago: University of Chicago Press, 1994), 239-256.

26. "401(k) Plans and Tax-Deferred Saving," in D. Wise, ed., Studies in the Economics of Aging (Chicago: University of Chicago Press, 1994), 105-138. (with S. Venti and D. Wise)

27. "Tax Policy Changes and the Pricing of Tax-Exempt Bonds," in S. Heide, R. Klein, and J. Lederman, eds., The Handbook of Municipal Bonds (Probus Publishers: 1994), 271-280.

28. "Government Intervention in Markets for Education and Health: How and Why," in V. Fuchs, ed., Individual and Social Responsibility (Chicago: University of Chicago Press, 1995), 277-304.

29. "Tax Incentives and Employer Provided Health Insurance," in M. Feldstein and J. Poterba, eds., Empirical Foundations of Household Taxation (Chicago: University of Chicago Press, 1996), 135-164. (with J. Gruber)

30. "Do 401(k) Plans Replace Other Employer Provided Pensions?," in D. Wise, ed., Advances in the Economics of Aging (Chicago: University of Chicago Press, 1996), 219-236. (with L. Papke and M. Petersen)

31. "Personal Saving Behavior and Retirement Income Modeling: A Research Assessment," in E. Hanushek and N. Maritato, eds., Assessing Knowledge of Retirement Behavior (Washington: National Academy of Sciences, 1996), 123-148.

32. "Fundamental Tax Reform and Employer-Provided Health Insurance," in H. Aaron and W. Gale, eds., Economic Effects of Fundamental Tax Reform (Washington: Brookings Institution, 1996), 125-162. (with J. Gruber)

33. "Do Budget Rules Work?," in A. Auerbach, ed., Fiscal Policy: Lessons from Economic Research (Cambridge: MIT Press, 1997), 53-86.

34. "The Effects of Special Saving Programs on Saving and Wealth," in M. Hurd and N. Yashiro, eds., The Economic Effects of Aging in the United States and Japan (Chicago: University of Chicago Press: 1997), 217-240. (with S. Venti and D. Wise)

35. "Distributional Effects of Adopting a National Retail Sales Tax," in J. Poterba, ed., Tax Policy and the Economy 11 (1997), 49-90. (with D. Feenberg and A. Mitrusi)

36. "The Growth of 401(k) Plans: Evidence and Implications," in S. Schieber and J. Shoven, eds., Public Policy Toward Pensions (Cambridge, MA: MIT Press, 1997), 177-196.

37. "Household Portfolio Structure: Taxation and Other Factors," Proceedings of the 89th Annual Conference of the National Tax Association (1997), 391-401. (with A. Samwick)

38. "Lump Sum Distributions from Retirement Saving Plans: Receipt and Utilization," in D. Wise, ed., Inquiries in the Economics of Aging (Chicago: University of Chicago Press, 1998), 85-105. (with S. Venti and D. Wise)

39. "Individual Financial Decisions in Retirement Saving Plans and the Provision of Resources for Retirement," in M. Feldstein, ed., Privatizing Social Security (Chicago: University of Chicago Press, 1998), 363-393. (with D. Wise)

40. "Employee Decisions with Respect to 401(k) Plans," in O. Mitchell and S. Schieber, eds., Living with Defined Contribution Pensions: Remaking Responsibility for Retirement (Philadelphia: University of Pennsylvania Press, 1998), 98-112. (with A. Kusko and D. Wilcox).

41. "Personal Retirement Saving Programs and Asset Accumulation: Reconciling the Evidence," in D. Wise, ed., Frontiers of the Economics of Aging (Chicago: University of Chicago Press, 1998), 23-106. (with S. Venti and D. Wise)

42. "Implications of Rising Personal Retirement Saving," in D. Wise, ed., Frontiers of the Economics of Aging: Volume 7 (Chicago: University of Chicago Press, 1998), 125-167. (with S. Venti and D. Wise)

43. "State Fiscal Institutions and the U.S. Municipal Bond Market," in J. Poterba and J. von Hagen, eds., Fiscal Institutions and Fiscal Performance (Chicago: University of Chicago Press, 1999), 181-207. (with K. Rueben),

44. "After-Tax Performance Evaluation," in Association for Investment Management and Research, Investment Counseling for Taxable Clients (Charlottesville, VA: AIMR, 1999), 92-99.

45. “The Estate Tax and After-Tax Investment Returns," in J. Slemrod, ed., Does Atlas Shrug: The Economic Consequences of Taxing the Rich (Cambridge: Harvard University Press, 2000), 333-353.

46. “Portfolio Choice," in J. Cordes, R. Ebel, and J. Gravelle, eds., The Encyclopedia of Taxation and Tax Policy (Washington: Urban Institute Press, 1999), 279-283.

47. “The Role of Real Annuities and Indexed Bonds in an Individual Accounts Retirement System,” in J. Campbell and M. Feldstein, eds., Risk Aspects of Investment-Based Social Security Reform (Chicago, University of Chicago Press, 2000), 321-360. (with J. Brown and O. Mitchell)

48. “Personal Retirement Accounts and Personal Choice,” in D. Wise, ed., Personal Saving, Personal Choice (Stanford: Hoover Institution Press, 1999), 11-41. (with D. Wise)

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September 2006