

# Suzanne Bliven Shu

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## Current Positions:

Dean of Faculty & Research, Cornell University, SC Johnson College of Business, January 2022 – present

John S. Dyson Professor of Marketing, Cornell University, Charles H. Dyson School of Applied Economics and Management at the SC Johnson College of Business and College of Agriculture and Life Sciences, July 2020 – present

Professor Emeritus, University of California Los Angeles, Anderson School of Management, July 2021 – present

## Past Positions:

Associate Professor of Marketing, University of California Los Angeles, Anderson School of Management, July 2014 - July 2020.

Visiting Scholar, Consumer Financial Protection Bureau, Office of Older Americans and Office of Research, January 2017 – October 2019.

Assistant Professor of Marketing, University of California Los Angeles, Anderson School of Management, July 2008-June 2014

Visiting Assistant Professor of Marketing, University of California Los Angeles, Anderson School of Management, August 2007-June 2008

Assistant Professor of Marketing, Southern Methodist University, Cox School of Business, June 2004-August 2007

Visiting Professor in Decision Sciences, INSEAD, Spring 2005

Lecturer in Marketing, University of Chicago GSB, Winter 2004

Summer Associate, ZS Associates, Summer 1998

Product and Project Manager, Bell Communications Research, 1992-1997

Assistant Director of Admissions, Cornell University, College of Engineering, 1990-1992

## Education:

University of Chicago, Graduate School of Business, Ph. D. in Behavioral Science, 2004.

Dissertation: “Two Essays Regarding the Influence of Temporal Spacing on Judgment and Usage Timing” (Chair: Richard Thaler)

University of Chicago, Graduate School of Business, M.B.A., 2003.

Cornell University, College of Engineering, M.E. in Electrical Engineering, 1992.

Thesis: “Training of Feedforward Neural Network Architectures for Feature Recognition”

Cornell University, College of Engineering, B.S.E.E. with Distinction, 1990.

## Activities and Honors:

Consumer Financial Protection Bureau Academic Research Council, 2023-2025.

NBER Research Associate, 2020-present.

Netspar (Network for Studies on Pensions, Ageing and Retirement) Scientific Council, 2023-present.

Marketing Science Institute Scholar, 2018.

UCLA Anderson Dean's Prize, 2017 (outstanding faculty mentorship of Ph.D. students).  
Finalist, 2016 Paul E. Green Award, Journal of Marketing Research (best paper award).  
NBER Faculty Research Fellow, 2015-2020

UCLA Medical School joint faculty appointment, 2011-present.

Research Fellow, USC Center for Economic and Social Research, 2014-present.

University of Colorado Center for Research on Consumer Financial Decision Making affiliated scholar, 2011-present.

Behavioral Economics and Consumer Finance Working Group (sponsored by Russell Sage and Alfred P. Sloan Foundations), 2009-present.

NBER Research Economist, 2012-2015.

UCLA Ziman Center for Real Estate Faculty Research Fellow, 2010.

Nominee for SMU Golden Mustang Teaching Award, 2006.

SMU Cox Distinguished MBA Teaching Award, 2006.

INFORMS Decision Analysis Society Student Paper Competition Finalist, 2005.

State Farm Companies Foundation Doctoral Dissertation Award, 2004.

MSI 2003 Alden G. Clayton Doctoral Dissertation Proposal Competition, Hon. Mention.

Hillel Einhorn Memorial Fellowship, 2002-2003.

University of Chicago Graduate School of Business Doctoral Fellowship, 1998-2002.

Fellow, Summer Institute on Behavioral Economics, Russell Sage Foundation, 2000.

#### **Peer reviewed journal articles published:**

Christensen, Kate, and Suzanne B. Shu, "The Role of Heritage Connection in Consumer Valuation," forthcoming at Journal of Marketing Research. doi: 10.1177/00222437231182434

Greenberg, Adam Eric, Hal E. Hershfield, Suzanne B. Shu, and Stephen D. Spiller (2023), "What Motivates Social Security Claiming Age Intentions? Testing Behaviorally-Informed Interventions alongside Individual Differences," Journal of Marketing Research, 60(6), 1052-1070. doi: 10.1177/00222437221147221

Chu, Charlene, and Suzanne B. Shu (2023), "Silver Linings: Mementos Attenuate the Endowment Effect," Journal of Behavioral Decision Making, 36(1). doi: 10.1002/bdm.2295.

Ladapo, Orstad, Wali, Wylie-Rosett, Tseng, Chung, Cuevas, Hernandez, Parraga, Ponce, Sweat, Wittleder, Shu, Goldstein, and Jay (2023), "Effectiveness of Goal-directed and Outcome-based Financial Incentives for Weight Loss: A Randomized Controlled Trial," JAMA Internal Medicine, 183(1), 61-69. doi:10.1001/jamainternmed.2022.5618.

Chin, Alycia, David Zimmerman, Heidi Johnson, and Suzanne B. Shu (2022), "Decisions about overdraft coverage: Disclosure design and personal finances," Journal of Experimental Psychology: Applied, 28(4), 746-774. doi: 10.1037/xap0000460.

Mafi, Walling, Arbanas, Vangala, Sorensen, Cheng, Turner, Villaflores, Trutner, Cheng, Waterman, Shu, Goldstein, and Sarkisian (2022), "A pragmatic parallel arm

- randomized-controlled trial of a multi-pronged electronic health record-based clinical decision support tool protocol to reduce low-value antipsychotic prescriptions among older adults with Alzheimer's and related dementias," PLOS ONE, 17(12), 1-13. <https://doi.org/10.1371/journal.pone.0277409>.
- Thomas, Manoj, Helen Chun, Sachin Gupta, Jura Liaukonyte, Suzanne Shu, and Kaitlin Woolley (2022), "Authentically Cornell: the Evolution of Marketing at Cornell," Customer Needs and Solutions, 9, 60–65. doi: 10.1007/s40547-022-00129-0
- Peck, Joann, Colleen Kirk, Andrea Luangrath, and Suzanne B. Shu (2021), "Caring for the Commons: Using Psychological Ownership to Enhance Stewardship Behavior of Public Goods," Journal of Marketing, 85(2), 33-49.
- Morewedge, Carey, Ashwani Monga, Robert W. Palmatier, Suzanne B. Shu, and Deborah A. Small (2021), "Technology Driven Evolution of Consumption: A Psychological Ownership Framework," Journal of Marketing, 85(1):196-218.
- Dellaert, Benedict G.C., Suzanne B. Shu, Theo A. Arentze, Tom Baker, Kristin Diehl, Bas Donkers, Nathaniel J. Fast, Gerald Haubl, Heidi Johnson, Uma R. Kamarkar, Harmen Oppewal, Bernd H. Schmitt, Juliana Schroeder, Stephen A. Spiller, and Mary Steffel (2020), "Consumer Decisions with Artificially Intelligent Voice Assistants," Marketing Letters, 31, 335–347.
- Shapiro, Martin F., Suzanne B. Shu, Noah J. Goldstein, Ronald G. Victor, Craig R. Fox, Chi-Hong Tseng, Sitaram Vangala, Braden K. Mogler, Stewart B. Reed, Estivalli Villa, and Jose J. Escarce (2020), "Impact of a Patient-Centered Behavioral Economics Intervention on Hypertension Control in a Highly Disadvantaged Population: A Randomized Trial," Journal of General Internal Medicine, 35(1), 70-78.
- Takada, S., Ober, A.J., Currier, J.S., Goldstein, N.J., Horwich, T.B., Mittman, B.S., Shu, S.B., Tseng, C.H., Vijayan, T., Wali, S. and Cunningham, W.E. (2020), "Reducing cardiovascular risk among people living with HIV: Rationale and design of the INcreasing Statin Prescribing in HIV Behavioral Economics REsearch (INSPIRE) randomized controlled trial," Progress in Cardiovascular Diseases, 63(2), 109-117.
- Bakr, Omar, Afsar-Manesh, Nasim, Raja, Naveen, Dermenchyan, Anna, Goldstein, Noah J., Shu, Suzanne B., and May, Folasade P. (2020), "Application of Behavioral Economics Principles Improves Participation in Mailed Outreach for Colorectal Cancer Screening," Clinical and Translational Gastroenterology, 11(1), 1-7.
- Sharif, Marissa, and Suzanne B. Shu (2019), "Nudging Persistence after Failure through Emergency Reserves," in press at Organizational Behavior & Human Decision Processes.
- Jay, Melanie, Stephanie L. Orstad, Soma Wali, Judith Wylie-Rosette, Chi-Hong Tseng, Victoria Sweat, Sandra Wittleder, Suzanne B. Shu, Noah Goldstein, and Joseph A. Ladapo (2019), "Goal-directed versus outcome-based financial incentives for weight loss among low-income patients with obesity: Rationale and design of the Financial Incentives foR Weight Reduction (FIREWoRK) randomized controlled trial," BMJ Open, 9:e025278. doi: 10.1136/bmjopen-2018-025278.
- Shu, Suzanne B. and Marissa Sharif (2018), "Occasion Matching for Indulgences," Journal of Marketing Behavior, 3(3), 211-239.
- Webb, Elizabeth, and Suzanne B. Shu (2018), "The Effect of Perceived Similarity and Categorization on Consumer Sequential Risk-Taking," Journal of Marketing Research, 55(6), 916-933.

- Shu, Suzanne B., Robert Zeithammer, and John W. Payne (2018), "The Pivotal Role of Fairness: Which Consumers Like Annuities?" Financial Planning Review, 1(3-4), 1019-1022.
- Shu, Suzanne B. and Stephen D. Shu (2018), "The Psychology of Decumulation Decisions During Retirement," Policy Insights from the Behavioral and Brain Sciences, 5(2), 216-223.
- Bang, H. Min, Suzanne B. Shu, and Elke Weber (2018), "The Role of Perceived Effectiveness on the Acceptability of Choice Architecture," Behavioural Public Policy, Feb, 1-21.
- Webb, Elizabeth, and Suzanne B. Shu (2017), "Is Broad Bracketing Always Better? How Broad Decision Framing Leads to More Optimal Preferences over Repeated Gambles," Judgment and Decision Making, 12(4), 382-395.
- Shu, Suzanne B. (2017), "Commentary: Incorporating Memory Processes into the Modeling of Habits," Journal of the Association of Consumer Research, 2(3), 306-308.
- Sharif, Marissa, and Suzanne B. Shu (2017). "The Benefits of Emergency Reserves: Greater Preference and Persistence for Goals That Have Slack with a Cost," Journal of Marketing Research, 54 (3), 495-509.
- Madrian, Brigitte, Hal E. Hershfield, Abigail B. Sussman, Julian Jamison, Eric J. Johnson, John G. Lynch, Saurabh Bhargava, Jeremy Burke, Scott A. Huettel, Stephan Meier, Scott Rick, and Suzanne B. Shu (2017), "Policy Applications of Behavioral Insights to Household Financial Decision Making," Behavioral Science & Policy, 3(1), 27-40.
- Beymer, Matthew R., Robert E. Weiss, Catherine A. Sugar, Linda B. Bourque, Gilbert C. Gee, Donald E. Morisky, Suzanne B. Shu, Marjan Javanbakht, and Robert K. Bolan (2017). "Are Centers for Disease Control and Prevention Guidelines for Preexposure Prophylaxis Specific Enough? Formulation of a Personalized HIV Risk Score for Pre-Exposure Prophylaxis Initiation," Sexually Transmitted Diseases, 44 (1), 49-57.
- Beymer, Matthew, Aimee Drolet-Rossi, and Suzanne B. Shu (2016). "Assessing Self-Control and Geosocial Networking App Behavior among an Online Sample of Men who have Sex with Men," Journal of Urban Health, 93 (4), 698-708.
- Shu, Suzanne B., Robert Zeithammer, and John W. Payne (2016), "Consumer Preferences for Annuity Attributes: Beyond Net Present Value," Journal of Marketing Research, 53 (2), 240-262. (Finalist for 2016 Paul E. Green Award)
- Shu, Suzanne B., and Claudia Townsend (2014). "Using Aesthetics and Self-affirmation to Encourage Openness to Risky (and Safe) Choices," Journal of Experimental Psychology: Applied, 20 (Mar), 22-39.
- Shu, Suzanne B., and Kurt Carlson (2014). "When Three Charms but Four Alarms: Identifying the Optimal Number of Claims in Persuasion Settings," Journal of Marketing, 78 (Jan), 127-139.
- Payne, John W., Namika Sagara, Suzanne B. Shu, Kirstin C. Appelt, and Eric J. Johnson (2013). "Life Expectation: A Constructed Belief? Evidence of a Live To or Die By Framing Effect," Journal of Risk and Uncertainty, 46, 27-50.
- Mogler, Braden, Suzanne Shu, Noah Goldstein, Craig Fox, Jose Escarce, and Martin Shapiro (2013). "Using Insights from Behavioral Economics and Social Psychology to Help Patients Manage Chronic Diseases," Journal of General Internal Medicine, 28 (5), 711-718.

- Johnson, Eric J., Suzanne B. Shu, Benedict G.C. Dellaert, Craig Fox, Daniel G. Goldstein, Gerald Haubl, Richard P. Larrick, Ellen Peters, John W. Payne, David Schkade, Brian Wansink, and Elke U. Weber (2012). "Beyond Nudges: Tools of Choice Architecture," Marketing Letters, 23, 487-504.
- Shu, Suzanne B., and Joann Peck (2011). "Perceived Ownership and Affective Reaction: Emotional Attachment Process Variables and the Endowment Effect," Journal of Consumer Psychology, 21 (4), 439-452.
- Shu, Suzanne B., and Ayelet Gneezy (2010). "Procrastination of Enjoyable Experiences," Journal of Marketing Research, 47 (Oct), 933-944.
- Townsend, Claudia, and Suzanne B. Shu (2010). "When and How Aesthetics Influences Financial Decisions," Journal of Consumer Psychology, 20 (Oct), 452-458.
- Peck, Joann, and Suzanne B. Shu (2009). "The Effect of Mere Touch on Perceived Ownership," Journal of Consumer Research, 36 (Oct), 434-447.
- Shu, Suzanne B. (2008). "Future-biased Search: The Quest for the Ideal," Journal of Behavioral Decision Making, 21 (4), 352-377.
- Carlson, Kurt, and Suzanne B. Shu (2007). "The Rule of Three: How the Third Event Signals the Emergence of a Streak," Organizational Behavior and Human Decision Processes, 104 (1), 113-121.
- Howard, Daniel, Suzanne B. Shu, and Roger Kerin (2007). "Reference Price and Scarcity Appeals: A Note on the Use of Multiple Influence Strategies in Retail Newspaper Advertising," Social Influence, 2 (1), 18-28.

#### **Chapters in books:**

- Rottenstreich, Yuval, and Suzanne B. Shu (2004). "The Connections Between Affect and Decision Making: Nine Resulting Phenomena". In Derek Koehler and Nigel Harvey (eds.), *The Blackwell Handbook of Judgment and Decision Making*, Oxford: Oxford University Press, 444-463.
- Peck, Joann, and Suzanne B. Shu (2018). "Introduction: Psychological Ownership and Consumer Behavior." In Joann Peck and Suzanne B. Shu (eds.), *Psychological Ownership and Consumer Behavior*, New York: Springer Publishing.
- Shu, Suzanne B. (2018). "Psychological Ownership in Financial Decisions." In Joann Peck and Suzanne B. Shu (eds.), *Psychological Ownership and Consumer Behavior*, New York: Springer Publishing.
- Shu, Suzanne B., and Joann Peck (2018). "Solving Stewardship Problems with Increased Psychological Ownership." In Joann Peck and Suzanne B. Shu (eds.), *Psychological Ownership and Consumer Behavior*, New York: Springer Publishing.

#### **Books:**

- Peck, Joann, and Suzanne B. Shu (2018). *Psychological Ownership and Consumer Behavior*, New York: Springer Publishing.

#### **Peer reviewed journal articles submitted:**

- Hur, Elina Yewon, and Suzanne B. Shu, "Not All Green is Equal: The Order of Environmental Harm and Benefit Matters," preparation for second round review at Journal of Marketing Research.

Bogard, Jonathan E., and Suzanne B. Shu, "Algorithm Aversion and the Aversion to Counter-Normative Decision Procedures," preparation for second round review at Nature and Human Behavior.

Mishra, Nirajana, Emily N. Garbinsky, and Suzanne B. Shu, "Talking About Money with the One You Love: How Financial Stress Influences Couples' Financial Communication," under second round review at Journal of Consumer Psychology.

Sirwani, Deepak, and Suzanne B. Shu, "Perceptual Time Dilation: How Computational Ease Influences Time Perception in Lab and Field Settings," in preparation for second round review at Journal of Marketing Research.

Weber, Megan E., Hal E. Hershfield, Stephen A. Spiller, and Suzanne B. Shu, "The Role of Stock-Flow Reasoning in Understanding the Social Security Trust Fund," under review at Management Science.

John, Elicia, Hal E. Hershfield, and Suzanne B. Shu, "A Salient and Close Past Self Motivates Weight Loss Maintenance," in preparation for second round review at Journal of Marketing.

#### **Working Papers** (available upon request):

Shu, Suzanne B., and Helen Colby, "Bringing Cost-Benefit Analysis to Marketing Research."

Chu, Charlene K., and Suzanne B. Shu, "Consuming Mementos with Experiences: Predicting When Consumers Desire Mementos."

Shu, Suzanne B., John W. Payne, and Namika Sagara, "The Psychology of Social Security Claiming: Exploring Individual Differences in Beliefs and Values with Tests of Behavioral Interventions."

Payne, John W., Suzanne B. Shu, Namika Sagara, and Elizabeth Webb, "Individual Heterogeneity in Loss Aversion"

Demirdag, Ipek, and Suzanne B. Shu, "A Look Inside the Black Box: Explainability of Algorithmic Decisions Drives Consumer Satisfaction in the Digital World."

#### **Selected Research in Progress:**

"The Role of Perceived Fairness in Consumer Attitudes Toward Financial Products."

"Bringing Theories of Consumer Behavior to Inform Research on Decumulation," with John Payne.

#### **Peer-reviewed conference publications:**

Kate Christensen and Suzanne Shu (2020), "Heritage Lost: How Connection to the Past Shapes Consumer Valuation in the Present", in NA - Advances in Consumer Research Volume 48, eds. Jennifer Argo, Tina M. Lowrey, and Hope Jensen Schau, Duluth, MN : Association for Consumer Research, Pages: 868-873.

Charlene Chu and Suzanne Shu (2020), "Happiness From Unique Purchases", in NA - Advances in Consumer Research Volume 48, eds. Jennifer Argo, Tina M. Lowrey, and Hope Jensen Schau, Duluth, MN : Association for Consumer Research, Pages: 1038-1042.

Jonathan Elliot Bogard and Suzanne Shu (2020), "Averse to Algorithms Or Averse to Uncommon Decision Procedures?", in NA - Advances in Consumer Research Volume 48, eds. Jennifer Argo, Tina M. Lowrey, and Hope Jensen Schau, Duluth, MN : Association for Consumer Research, Pages: 223-224.

- Ipek Demirdag and Suzanne Shu (2020), "Creating Ownership Where Ownership Does Not Exist: Psychological Ownership Increases Enjoyment in Sharing Economy", in NA - Advances in Consumer Research Volume 48, eds. Jennifer Argo, Tina M. Lowrey, and Hope Jensen Schau, Duluth, MN : Association for Consumer Research, Pages: 868-873.
- Suzanne Shu and John Payne (2015), "Psychological Factors in Savings and Decumulation Decisions", in NA - Advances in Consumer Research Volume 43, eds. Kristin Diehl and Carolyn Yoon, Duluth, MN : Association for Consumer Research, Pages: 136-141.
- John Payne, Suzanne Shu, Elizabeth Webb, and Namika Sagara (2015), "Development of an Individual Measure of Loss Aversion", in NA - Advances in Consumer Research Volume 43, eds. Kristin Diehl and Carolyn Yoon, Duluth, MN : Association for Consumer Research, Pages: 260-264.
- Joann Peck and Suzanne Shu (2015), "From Tragedy to Benefit of the Commons: Increasing Shared Psychological Ownership", in NA - Advances in Consumer Research Volume 43, eds. Kristin Diehl and Carolyn Yoon, Duluth, MN : Association for Consumer Research, Pages: 40-44.
- Townsend, Claudia, and Suzanne Shu (2011), "Aesthetics as Impetus to Riskier Decision-Making," Advances in Consumer Research Volume 38, eds. Darren W. Dahl, Gita V. Johar, and Stijn M.J. van Osselaer, Duluth, MN : Association for Consumer Research.
- Shu, Suzanne (2010), "The Role of Self-connectedness in Short Run Losses and Long Run Gains," Advances in Consumer Research Volume 37, eds. Margaret C. Campbell and Jeff Inman and Rik Pieters, Duluth, MN : Association for Consumer Research.
- Townsend, Claudia, and Suzanne Shu (2010), "The Power of Aesthetic Design in Consumer Financial Decisions," in Advances in Consumer Research Volume 37, eds. Margaret C. Campbell and Jeff Inman and Rik Pieters, Duluth, MN : Association for Consumer Research.
- Carlson, Kurt, and Suzanne Shu (2010), "The More-is-less Effect: How Adding Positive Arguments Can Undermine Attitude Toward an Object," in Advances in Consumer Research Volume 37, eds. Margaret C. Campbell and Jeff Inman and Rik Pieters, Duluth, MN : Association for Consumer Research.
- Shu, Suzanne, and Joann Peck (2007), "To Hold Me is to Love Me: The Role of Touch in the Endowment Effect," Advances in Consumer Research Volume 34, eds. Gavan Fitzsimons and Vicki Morwitz, Orlando, FL: Association for Consumer Research.
- Shu, Suzanne (2006), "Choosing for the Long Run: Making Tradeoffs in Multi-period Borrowing," Advances in Consumer Research Volume 33, eds. Cornelia Pechmann and Linda L. Price, Duluth, MN: Association for Consumer Research.
- Shu, Suzanne (2005), "Choosing to Consume Later: Determinants of Future-Biased Choice," Advances in Consumer Research Volume 32, eds. Gita Menon and Akshay R. Rao, Duluth, MN: Association for Consumer Research.
- Shu, Suzanne, and George Wu (2004), "Belief Bracketing: Can Partitioning Information Change Consumer Judgments?" Advances in Consumer Research Volume 31, eds. Barbara E. Kahn and Mary Frances Luce, Valdosta, GA: Association for Consumer Research.

## **Research Grants:**

- "The Role of Stock-Flow Reasoning in Understanding the Social Security Trust Fund" funded by Social Security Administration as part of the NBER Research and Disability Research Center (NB22-15), Sept. 2021- Sept. 2022, \$78,000 (Principal Investigator).
- "Communicating the Implications of the Joint Decision of How Long to Work and When to Claim Benefits" funded by Social Security Administration as part of the NBER Retirement Research Center, Sept. 2020 – Sept. 2021. \$78,000 (Principal Investigator)
- "Broad Framing in Retirement Income Decision Making" funded by Social Security Administration as part of the NBER Retirement Research Center, Sept. 2019 – Sept. 2020. \$75,000 (Principal Investigator)
- "The Role of Affect in Preferences for Guaranteed Income Streams in Retirement" funded by TIAA Institute, Sept 2018-Sept 2019. \$35,000 (Principal Investigator)
- "Pragmatic Trial of an Electronic Health Record/Behavioral Economics Intervention to Reduce Pre-operative Testing for Cataract Surgery" funded by National Institute of Health (NIH), Grant #1R01AG059815-01, \$537,829. July 2018 – June 2021. (Co-investigator)
- "Behavioral Economics and Implementation Research to Reduce Cardiovascular Risk In HIV-infected Adults" funded by National Institute of Health (NIH), Grant #U01HL142104-01, June 2018 – May 2022. \$709,668. (Co-investigator)
- "What Motivates Social Security Claiming Age Intentions? Testing Behaviorally-Informed Interventions Alongside Individual Differences" funded by Social Security Administration as part of the NBER Retirement Research Center, Sept. 2017 – Sept. 2018. \$88,850 (Principal Investigator)
- "The Role of Mortality Salience in SSA Claiming Decisions" funded by Social Security Administration as part of the NBER Retirement Research Center, NB17-08, Sept. 2016 – Sept. 2017. \$40,000 (Principal Investigator)
- "Financial incentive strategies for weight loss in obese patients living in socioeconomically disadvantaged neighborhoods" funded by NIH, 7R01MD011544-02, April 2017 – March 2022, \$745,000 (Co-Investigator).
- "Exploring How Uncertainty in Longevity Estimates Predicts SSA Claiming Decisions" funded by Social Security Administration as part of the NBER Retirement Research Center, NB17-09, Sept. 2016 – Sept. 2017. \$42,000 (Principal Investigator)
- "The Psychology of SSA Claiming Decisions: Customizing Process Interventions to Account for Claimant Heterogeneity" funded by Social Security Administration as part of the NBER Retirement Research Center, NB15-07, Sept. 2014 – Sept. 2015. \$54,000 (Principal Investigator)
- "The Psychology of SSA Claiming Decisions: Toward the Understanding and Design of Interventions " funded by Social Security Administration as part of the NBER Retirement Research Center, NB14-07, Sept. 2013 – Sept. 2014. \$52,000 (Principal Investigator)
- "Life Expectation Judgments, Fairness and Loss Aversion in the Psychology of SSA Claiming Decisions" funded by Social Security Administration as part of the NBER Retirement Research Center, NB13-05, Sept. 2012 – Sept. 2013. \$42,500 (Principal Investigator)
- "Heuristics and Affect in Long-term Choices for Annuities and Mortgages," funded by the Alfred P. Sloan Foundation, Grant #2010-5-18 ECON, July 2010 – July 2011. \$70,385. (Principal Investigator)



"Reducing Procrastination of Mammograms Through Shorter Implied Deadlines" funded by UCLA Clinical and Translational Science Institute Transdisciplinary Seed Grant, UL1TR000124, March 2013 – March 2014. \$25,000 (Principal Investigator)

"Monetary Incentives and Intrinsic Motivation to Sustain Hypertension Control," funded by the National Institute of Health (NIH), Grant #1RC4AG039077-01, September 2010 – August 2013. \$1,247,695 (Co-investigator)

"Financial Incentives and SMS to Improve African American Women's Glycemic Control," funded by the National Institute of Health (NIH), Grant #1P60MD00692301, August 2012 – January 2017. \$6,400,000. (Co-investigator)

UCLA Ziman Center for Real Estate Research Grant, July 2010 – July 2011. \$6,000.

### **Invited Presentations and Conference Presentations:**

2023: University of Toronto, Temple University, Investments & Wealth, Avantis Investments (keynote), Cornell Center for Veterinary Business and Entrepreneurship

2022: Pensions & Investments DC East (keynote), Defined Contribution Institute – Chicago, Academy of Management, CEPAR Policy Dialogue, UNSW Sydney, EBRI, Society for Judgment and Decision Making (presidential keynote)

2021: University of Southern California, Center for Financial Planning Board Academic Research Conference (keynote), Weill Cornell Medicine (Internal Medicine), SCP Numerical Markers Conference, Johns Hopkins University, Northeastern Marketing Conference, Boston College Consumer Finance Workshop, DC Institute

2020: University of Arizona, Society for Consumer Psychology, TIAA Institute Fellows Symposium, Retirement and Disability Research Consortium Annual Meeting, Society for Judgment and Decision Making

2019: Cornell University, University of Chicago, University of Miami, University of California San Diego, PIMCO, Plan Sponsor Council of America, Boulder Conference on Consumer Financial Decision Making, Choice Symposium

2018: University of Chicago, University of Edmonton, ZS Associates, Certified Financial Analysts - LA, Defined Contribution Institutional Investment Association, Consumer Financial Protection Bureau, Boulder Conference on Consumer Financial Decision Making

2017: Washington University, University of Delaware, Society for Judgment and Decision Making

2016: Georgetown University, University of Connecticut, Carnegie Mellon University, Consumer Financial Protection Bureau, Boulder Conference on Consumer Financial Decision Making

2015: Columbia University, University of Chicago, Frontiers of Behavioral Economics, LPL, Association for Consumer Research

2014: Retirement Research Consortium Annual Meeting, International Congress of Applied Psychology, Boulder Conference on Consumer Financial Decision Making, RAND

2013: University of Pennsylvania (Wharton), UCLA Fink Center Advisory Board, Columbia University, Retirement Research Consortium Annual Meeting

2012: American Risk and Insurance Association (ARIA) Conference, Retirement Research Consortium Annual Meeting, University of Colorado Law School, Southern California Marketing Camp, Boulder Conference on Consumer Financial Decision Making

2011: Cornell University, USC, University Wisconsin Madison, Washington University, Annual Meeting of the Academy of Behavioral Finance & Economics

2010: Consumer Financial Protection Bureau, Boulder Conference on Consumer Financial Decision Making, Tobin Project Conference on Behavioral/Institutional Research and Financial Regulation, Association for Consumer Research

2009: Behavioral Finance Forum, Society for Consumer Psychology, Association for Consumer Research

2008: Behavioral Finance Forum, Society for Consumer Psychology

2007: Society for Judgment and Decision Making, Harvard University, UCLA

2006: Behavioral Decision Research in Management, Society for Judgment and Decision Making

2005: Association for Consumer Research, INSEAD

2004: Behavioral Decision Research in Management, Association for Consumer Research

2003: Association for Consumer Research, Columbia University, Yale University, Harvard Business School, Southern Methodist University, University of California Berkeley, University of Vermont

### **Teaching:**

#### Cornell University

AEM 2020 Better Decisions for Life, Love, and Money (elective) 2022, 2023

AEM 2420 Marketing for Dyson Majors (undergraduate core) 2021, 2022, 2023

AEM 3440 Consumer Behavior (undergraduate/graduate elective) 2021

NBAW 6040 Product and Brand Management (EMBA) 2023

NRE 5150 Doctoral Seminar in Behavioral Marketing (PhD seminar) 2020

#### UCLA Anderson School of Management

MGMT 223 Choice Architecture in Practice (MBA elective) 2019

MGMT 269D Behavioral Research Methods (PhD course) 2012, 2016

MGMT 298D Choice Architecture and Nudging in the Field (PhD course) 2018

MGMT 411 Marketing Management (MBA, FEMBA core) 2008-2020

MGMT 411 Marketing Strategy and Policy (EMBA core) 2019-2020

MGMT 472A Marketing Strategy and Policy (EMBA core) 2015-2018

MGMT 472B Customer Information Strategy (EMBA elective) 2015

MGMT 478 Behavioral Economics in Marketing (EMBA elective) 2017, 2018

MGMT 263A Consumer Behavior (MBA elective) 2008

MGMT 298D BDT Lab Seminar (PhD seminar) 2009-2017

MGMT 472A Marketing Strategy & Policy (GEMBA core) 2012

Medical Marketing program, "New Product Adoption" 2008-2017

#### Southern Methodist University, Cox School of Business

MKTG 6201 Marketing Management (MBA core) 2004-2007

MKTG 3340 Marketing Fundamentals: Honors (undergraduate honors core) 2005  
INSEAD Fontainebleau (France):

MDM Management Decision Making (MBA elective) 2005  
University of Chicago, Graduate School of Business:

Business 37000 Marketing Strategy (MBA core) 2004

**Doctoral Students** (\*indicates committee chair; dates beyond 2023 are estimates):

Claudia Townsend (marketing, 2011; Univ. Miami), Hyewook Jeong (marketing, 2011; UNIST), James Ostler (strategy, 2013; Univ. Michigan), Inigo Gallo (marketing, 2013; IESE), Elizabeth Webb\* (marketing, 2014; Columbia University), Vanessa Burbano (strategy, 2014; Columbia University), Sandhya Shimoga (public health, 2014; UC Irvine), Matt Beymer (public health, 2015; UCLA), Daniel Walters (M&O, 2017; INSEAD), Charlene Chu\* (marketing, 2017; Chapman University), Marissa Sharif\* (marketing, 2017; University of Pennsylvania), Elicia John\* (marketing, 2020; American University), Kate Christensen (marketing, 2021; Indiana University), Ipek Demirdag\* (marketing, 2022; Facebook), David Zimmerman\* (BDM, 2022; SEC), Jonathan Bogard (BDM, 2022; Washington University), Elina Hur\* (marketing, 2023; Temple Univ.), Deepak Sirwani (marketing, 2024, University of British Columbia), Michelle Wang\* (marketing, 2024), Rin Yoon (marketing, 2025).

**Media:**

Provided insight on consumer behavior for national and international media outlets, including National Public Radio (Marketplace), Associated Press, NBC News, Los Angeles Times, Christian Science Monitor, Yahoo Finance, and Bloomberg Radio.

Research on Social Security claiming profiled in Forbes, Wall Street Journal, UCLA Today, Reuters, Kiplinger Finance, etc.

Research on procrastination profiled in The Atlantic, New York Times, USA News and World Report, CBS News, Smart Money, Boston Globe, etc.

Research on touch profiled in TIME, CNN Money, CBC, Chicago Tribune, Smart Money, etc.

**Service:**

Co-Director, Cornell University Behavioral Economics and Decision Research Center, 2022-present.

President, Society for Judgment and Decision Making, 2021-2022.

2022 Conference Co-Chair for Behavioral Science and Policy Association.

Executive Board, Society for Judgment and Decision Making, 2016-2023 (2017 Conference Chair).

2020 Conference Co-Chair for Society of Consumer Psychology.

Workshop Chair for September 2018 Workshop on Financial Disclosure, CFPB.

Associate Editor, *Journal of Experimental Psychology: Applied* (2021-present).

Associate Editor, *Financial Planning Review* (2018-2022).

Associate Editor, *Journal of Marketing Research*, Special Issue on Consumer Financial Decision Making, 2011.

Editorial Review Board, *Journal of Consumer Psychology* (2014-present), *Journal of Marketing Behavior* (2012-2019), *Journal of Consumer Research* (2013-2020),

*California Management Review* (2013-2018), *Journal of Experimental Psychology: Applied* (2014-2021).

Ad-hoc reviewer: *Journal of Marketing Research*, *Management Science*, *Marketing Science*, *Psychological Science*, *Journal of Consumer Research*, *Marketing Letters*, *Journal of Marketing*, *Journal of Experimental Psychology: General*, *Organizational Behavior and Human Decision Processes*, *Journal of Behavioral Decision Making*, *the Strategic Management Journal*, *Journal of Economic Psychology*, and others.

University service since 2015: Johnson Graduate School of Management Dean Search Committee (Chair) 2023, Dyson Assurance of Learning Committee 2021-2022, Johnson PhD Committee (MMC) 2020-2022, Anderson Dean Search Committee 2018-2019, Marketing Area Co-Chair 2016-2019, Anderson MBA Admissions Faculty Reviewer 2013-2017, Anderson Staffing Committee 2015-2016, Anderson Dean Reappointment Review Committee 2016-2017, Anderson Executive Education Faculty Advisory Committee 2015-2017.

Government service: invited presentations & advisory meetings at Consumer Financial Protection Bureau, Department of Treasury, Federal Reserve (Washington DC), Social Security Administration (Retirement Research Council), and Government Accountability Office.