

# Zhe Li

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## EDUCATION

<b>Ph.D.</b> in Economics	Stony Brook University, Stony Brook, NY	expected May 2010
<b>M.A.</b> in Economics	Stony Brook University, Stony Brook, NY	May 2006
<b>B.A.</b> in Economics	Zhejiang University, Zhejiang, China	July 2004

## FIELDS OF SPECILIZATION

Labor Economics, Applied Econometrics, Applied Microeconomics, Financial Economics, Computational Economics, Economics of Aging and Pensions

## DISSERTATION

- Title: A life-cycle Analysis of Retirement Savings and Portfolio Choices: Optimal Asset Location and Allocation with Taxable and Tax-Deferred Investment
- Committee: Hugo Benítez-Silva (Co-Chair), Mark R. Montgomery (Co-Chair), and Silvio Rendon
- Award: **Dissertation Fellowship**, Center for Retirement Research at Boston College, funded by Social Security Administration, 2009-2010  
(See Official Announcement at Website:  
[http://crr.bc.edu/linked\\_in\\_content\\_pages/2009\\_dissertation\\_fellowship\\_recipients\\_2.html](http://crr.bc.edu/linked_in_content_pages/2009_dissertation_fellowship_recipients_2.html))
- **Job Market Paper**: “Retirement Savings and Portfolio Choices in Taxable and Tax-deferred Accounts” (*To be presented in the 2010 American Economic Association Meeting*)  
(See the Dissertation Abstract under separate cover)

## OTHER RESEARCH PAPERS

- “Company Stock Investment in 401(k) Plan,” manuscript, 2009
- “Investment Choice and Savings in Defined Contribution Pensions,” manuscript, 2008
- “The Job Lock Effect of Employer-Sponsored Pension Plans,” work in progress
- “The Role of Employer Match in Retirement Savings: Evidence from the Survey of Consumer Finances (1983-1989),” work in progress
- “Difference in Employer-Sponsored DC Pensions and IRAs: The Role of Employer Match,” work in progress
- “The Party Building in Non-public Small and Medium Enterprises—A Research of Taizhou City”, with Hongjun Liang and Dunli Li, *Transaction of Chinese Communist Party*, 5th, 66—71, 2004; and *The Report on Chinese Non-public Enterprises*, 2003

## TEACHING EXPERIENCE

- **Instructor (Full Responsibility)**
  - ✦ Economics of Social Insurance (Spring 2009, Spring 2008)
  - ✦ Corporate Finance (Fall 2008, Summer 2008)
  - ✦ Introduction to Economics (Fall 2007, Summer 2007, and Spring 2007)

- **Teaching Assistant**

- ◊ Intermediate Macroeconomics (Fall 2006)
- ◊ Intermediate Microeconomics (Summer 2006, Summer 2005)
- ◊ Introduction to Economics (Spring 2006, Fall 2005)
- ◊ Game Theory (Grader) (Spring 2005, Fall 2004)

## AWARDS AND HONORS

- **Dissertation Fellowship**, Center for Retirement Research at Boston College, funded by Social Security Administration, 2009-2010
- Dean's Fellowship for Professional Activities, Stony Brook University, 2008-2009
- Membership in the AAAS/Science Program for Excellence in Science, 2008 (Nominated by the Graduate School of Stony Brook University)
- Full tuition scholarship, Stony Brook University, Aug 2004-present
- Full Teaching Assistantship, Stony Brook University, Aug 2004-May 2009
- Research Access Program (R.A.P.) Travel Grant, Stony Brook University, Fall 2008 and Fall 2009
- The Outstanding Graduate of Zhejiang University, 2004
- Top Prize of University Scholarship, Zhejiang University, 2001-2003
- The Outstanding Student, Zhejiang University, 2001-2003

## CONFERENCE AND WORKSHOPS

### Presentation

- “Retirement Savings and Portfolio Choices in Taxable and Tax-deferred Accounts,”  
*American Economic Association 2010 Conference* (AEA), Atlanta, January 2010  
*Center for Retirement Research at Boston College*, Chestnut Hill, November 2009  
*Southern Economic Association 79<sup>th</sup> Annual Conference* (SEA), San Antonio, November 2009  
*Labor and Applied Microeconomics Workshop*, Department of Economics, Stony Brook University, February 2009
- “Investment Choice and Savings in Defined Contribution Pensions,”  
*Eastern Economic Association 35<sup>th</sup> Annual Conference* (EEA), New York City, March 2009  
*Southern Economic Association 78<sup>th</sup> Annual Conference* (SEA), Washington DC, November 2008  
*Labor and Applied Microeconomics Workshop*, Department of Economics, Stony Brook University, November 2007
- “Company Stock Investment in 401(k) Plan,”  
*Labor and Applied Microeconomics Workshop*, Department of Economics, Stony Brook University, November 2008

### Chair of Session

- Market and System  
*Southern Economic Association 78<sup>th</sup> Annual Conference* (SEA), Washington DC, November 2008
- Decisions and Choices  
*Southern Economic Association 79<sup>th</sup> Annual Conference* (SEA), San Antonio, November 2008

### Discussant

- “Saving for Retirement: A Composite Behavioral Model,” by Jennifer Michaels  
*Eastern Economic Association 35<sup>th</sup> Annual Conference* (EEA), New York City, March 2009

- “Old European Couples’ Retirement Decisions: the Role of Love and Money,” by Dario Pozzoli and Marco Ranzani  
*Eastern Economic Association 35<sup>th</sup> Annual Conference (EEA)*, New York City, March 2009
- “Is the Grass Greener on the Other Side of the River: The Choice of Where to Work and Where to Live for Movers,” by Kenneth P. Stanford  
*Southern Economic Association 78<sup>th</sup> Annual Conference (SEA)*, Washington DC, November 2008
- "Public Versus Private: A Dynamic Model of Health Insurance Choice," by Cristian Pardo and Whitney Schott  
*Southern Economic Association 79<sup>th</sup> Annual Conference (SEA)*, San Antonio, November 2008

### TECHNICAL SKILLS

- Statistical Package: Stata, SAS
- Programming Skills and Languages: Parallel programming (MPI), Fortran, Gauss, C, Matlab, Maple
- Editors: Vi, WinEdt, Word Processor

### DATASET ANALYZED

- The Health and Retirement Study (HRS)
- Panel Study of Income Dynamics (PSID)
- Survey of Consumer Finances (SCF)
- Current Population Survey (CPS)
- Consumer Expenditure Survey (CES)
- National Longitudinal Survey of Youth (NLSY79)
- Higher Education General Information Survey (HEGIS)

### PROFESSIONAL MEMBERSHIPS

- American Economic Association, Eastern Economic Association, Southern Economic Association, American Association for the Advancement of Science

### REFERENCES

#### Hugo Benítez-Silva

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Department of Economics  
Stony Brook University  
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#### Mark R. Montgomery

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#### Antony Webb

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