

Curriculum Vita

Jinkook Lee

University of Southern California

(E-mail) jinkook.lee@usc.edu

(Office) 213-821-2778; (Mobile) 614-598-7194

POSITIONS & HONORS

Employment

Senior Economist & Director, Center for Global Aging Research, University of Southern California, since 2013

Senior Economist, RAND Corporation, since 2006 (full-time in 2009 – 2013)

Visiting Professor, Davis School of Gerontology, University of Southern California, 2013 – 2014

Professor, Pardee RAND Graduate School, 2009 – 2013

Professor, Department of Consumer Sciences, Center for Human Resource Research, Ohio State University, 2002 – 2009

Associate Professor, Department of Housing & Consumer Economics; Institute of Gerontology, University of Georgia, 2000 – 2002

Visiting Associate Professor, Department of Marketing, University of Wisconsin, Madison, 1999 – 2000

Instructor, Assistant & Associate Professor, Department of Consumer & Industry Services Management, University of Tennessee, Knoxville, 1991 – 2000

Other Appointments & Honors

Social Science Population Science (SSPS) Panel B, the Center for Scientific Review, the National Institutes of Health, 2014 – 2020

Associate Editor, Journal of Economics of Ageing, since 2014

Scientific Advisory Board for the European Union's Data Service Infrastructure for the Social Sciences and Humanities (DASISH), 2012 – 2014

Editorial Board, Research on Aging, since 2012

RAND Bing Center Health Economics Investment Award, 2012

Scientific Advisor, English Longitudinal Study of Aging (ELSA), since 2010

Scientific Advisor, Chicago Health and Aging Project (CHAP), since 2009

Scientific Advisor, China Health and Retirement Longitudinal Study (CHARLS), since 2008

Filene Research Fellow, Filene Research Institute, Madison, WI, 2005 – 2009

Visiting Research Fellow, Korea Labor Institute, S. Korea, 2005 – 2006

Dean's Award for Research, College of Human Ecology, Ohio State University, 2005

Certified Financial Planner Board's Best Financial Planning Paper Award, 2002

Theoretical Journal Article Award, Association for Financial Counseling & Planning Education, 2001

The New Leader Award, Ohio State University Alumni Society, 2001

The Best Article Award, Certified Financial Planner Board, 2000

Visiting Economist, Federal Reserve Board, 1997 – 2000

The Jefferson Prize, Chancellor's Research Award, University of Tennessee-Knoxville, 1999

Applied Consumer Economics Award, American Council on Consumer Interests, 1998

Belk Faculty Research Award, University of Tennessee-Knoxville, 1998

Irma Giffles Faculty Enrichment Award, University of Tennessee, 1995

Loise Dickey Research Award, Ohio State University, 1989

EDUCATION

1993, Ph.D. Family & Consumer Economics, Ohio State University

1986, B.S. Human Ecology, Seoul National University, Seoul, Korea

PUBLICATIONS

Journal Articles

- Hu, P., H. Herningtyas, V. Kale, A. Risbud, H. McGreath, J. Lee., J. Strauss, J. O'Brian, D. Bloom, & T. Seeman. Validation and Quality Control for Dried Blood Spot Based C-reactive Protein Assay: Experience from the Indonesia Family Life Survey and the Longitudinal Study of Aging in India, *Biodemography and Social Biology*, forthcoming
- Arpawong, T.E., J. Lee, D.F. Phillips, E.M. Crimmins, M.E. Levine, & C.A. Prescott. "Effects of recent stress and genetic sensitivity on depressive symptoms: A longitudinal study of adults age 50 and older," *Journal of Behavioral Genetics*, forthcoming.
- Hu, P., V. Kale, A. Risbud, J. Lee, D. Bloom, E. Crimmins, & T. Seeman. "Validation and modification of dried blood spot-based glycosylated hemoglobin assay for the Longitudinal Aging Study in India," *American Journal of Human Biology*, forthcoming.
- Kapteyn, A., J. Lee, C. Tassot, H. Vonkova, & G. Zamarro, "Dimensions of subjective well-being," *Social Indicators Research*, 2014, DOI 10.1007/s11205-014-0753-0
- Lee, J., & J. Smith, "Regional disparities in adult height, educational attainment and gender difference in late-life cognition," *Journal of Economics of Aging*, 2014, <http://dx.doi.org/10.1016/j.jeo.2014.02.002>
- Manski, R., J. Moeller, H. Chen, J. Lee, & S. Listle. "Disparity in dental coverage among older adult populations: A comparative analysis across selected European countries and the United States," *International Dental Journal*, 2014, DOI:10.1111/idj.12139
- Levine, M., E. Crimmins, C. Prescott, D. Phillips, T.E. Arpawong, & J. Lee. "A polygenic risk score associated with measures of depressive symptoms among older adults," *Biodemography & Social Biology*, 2014, 60 (2): 199 – 211, 10.1080/19485565.2014.952705
- Fonseca, R., A. Kapteyn, J. Lee, G. Zamarro, & K. Feeney, A longitudinal study of well-being of older Europeans: Does retirement matter?," *Journal of Population Ageing*, 2014, 7: 21 - 41, DOI 10.1007/s12062-014-9094-7, PMID: 24729798.
- Lee, J., R. Shih, K. Feeney, & K. Langa, "Gender disparity in late-life cognitive functioning in India: Findings from the Longitudinal Aging Study in India (LASI)," *Journal of Gerontology: Social Science*, 2014, PMID: 24622150.
- Lee, S., J. Lee, & Y. Chang, "Is dual income costly for married couples? An analysis of household expenditures," *Journal of Family and Economic Issues*, 2014, 35:161 – 177, DOI 10.1007/s10834-013-9364-1.
- Cramm, J.M. & J. Lee, "Smoking, physical activity and healthy aging in India," *BMC Public Health*, 2014, 14:526, <http://www.biomedcentral.com/1471-2458/14/526>.
- Lee, C. & J. Lee "Employment Status, Quality of Matching, and Retirement in Korea: Evidence from the Korean Longitudinal Study of Aging," *Journal of Population Ageing*, 2013, DOI 10.1007/s12062-012-9080-x, PMID: 23935768.

- Lee, J., S. Paddock & K. Feeney "Emotional distress and cognitive functioning of older couples: A dyadic analysis," *the Journal of Aging and Health*, 2012, 24 (1): 113 – 140, <http://jah.sagepub.com/content/early/2011/10/11/0898264311423703>, PMID: 21990580.
- Kwon, K-N., & J. Lee "Moderating effects of consumer knowledge on the perception of small probabilities of risk," *Risk and Decision Analysis*, 2011, 2 (3): 171 - 179, 2011.
- Lee, J. & J. Smith "Explanations for Educational Gradients in Depressive Symptoms of Married Couples – The Case of Korea," *Research on Aging*, 2011, 20 (10): 1 – 26, DOI: 10.1177/0164027511409440.
- Lee, J. "Pathways from Education to Depression," *Journal of Cross-Cultural Gerontology*, 2011, 26: 121 – 135, PMID: 21282142.
- Lee, J., & Smith, J. "The Effect of Health Promotion on Diagnosis and Management of Diabetes," *Journal of Epidemiology and Community Health*, Published Online First: 30 January 2011 doi:10.1136/jech.2009.087304, PMID: 21282142.
- Lee, J. "Data Sets for Pension and Health: Data Collection and Sharing for Policy Design," *International Social Security Review*, 2010, 63, (3-4), 197 – 222
- Lee, J. & Smith, J. "Work, Retirement, and Depression," *Journal of Population Ageing*, 2009, 2, 57 – 71, PMID: 23687521.
- Lee, J. & Y. Lee "Old-age Income Security and Private Transfers in Korea," *Journal of Population Aging and Social Policy*, 2009, 21 (4), 393 – 407, PMID: 20092129.
- Kwon, K. & J. Lee "The Effects of Reference Points, Knowledge, and Risk Propensity on the Evaluation of Financial Products," *Journal of Business Research*, 2009, 62 (7), 719 – 725
- Lee, J., & Kim, H. "A Longitudinal Analysis of the Impact of Chronic Conditions on Wealth of Elders," *Journal of Population Economics*, 2008, 21(1), 217-230
- Lee, J., M.F. Abdul-Rahman, & H. Kim "Debit Card Usage: An Examination of Its Impact on Household Debt," *Financial Services Review*, 2007 16 (1), 73-87
- Cho, J., & J. Lee "The Effect of Joint Decision-Making on Perceived Risk and Risk-Taking Behavior: A Study of Household Investment Decisions." *Review of Business Research*, 2006, 59 (1), 112-120.
- Kim, H., & J. Lee "Impact of co-morbidity on wealth changes in later life," *Journal of Gerontology: Social Sciences*, 2006, 61B (6), S307-S314, PMID: 17114310.
- Kim, H., D. Kim, & J. Lee "The Impact of Age and Health on Vehicle Choices among Elders," *Journal of Family and Economic Issues*, 2006, Jan, 1 – 21.
- Lee, J., H. Kim, & S. Tanenbaum "Medicaid and family wealth transfer," *Gerontologists*, 2006, 46 (1), 6-13, PMID: 16452279.
- Cho, J., & J. Lee "An integrated model of risk and risk reducing strategy," *Journal of Business Research*, 2006, 59 (1), 112-120
- Lee, J., & J. Cho "Consumers' use of information intermediary and the impact on their information search behavior in the financial market," *Journal of Consumer Affairs*, 2005, 39 (1), 95 – 120
- Kim, H., & J. Lee "Unequal effects of elders' health problems on wealth depletion across race and ethnicity," *Journal of Consumer Affairs*, 2005, 39 (1), 148 – 172, PMID: 16773142.
- Fox, J., S. Batholomae, & J. Lee "Building the Case for Financial Education," *Journal of Consumer Affairs*, 2005, 39 (1), 195 – 214

- Hogarth, J.M., C.E. Anguelov, & J. Lee "Who has a bank account? Exploring changes over time, 1989 – 2001," *Journal of Family & Economic Issues*, 2005, 26 (1), 5 – 28
- Marlowe, J., & J. Lee "Decision-making criteria for financial services: Younger versus older consumers," *Journal of Consumer Education*, 2005, 12 -21.
- Lin, Q. C., & J. Lee "Consumer information search when making investment decisions," *Financial Services Review*, 2004, 13 (4), 319 – 332
- Lee, E-J., Eastwood, D., & J. Lee "A sample selection model of consumer adoption of computer banking," *Journal of Financial Services Research*, 2004, 26 (3), 263-275
- Hogarth, J.M., C.E. Anguelov, & J. Lee "Checkless households: Why don't households have a checking account?" *Journal of Consumer Affairs*, 2004, 38 (1), 1-34
- Lee, E-J., J. Lee, & D. Eastwood "A two-step estimation of consumer adoption of technology-based service innovations," *Journal of Consumer Affairs*, 2003, 37 (2), 256-282
- Kwon, K., & J. Lee "Concerns about online payment security and its influence on Internet purchases: An Online shopper's perspective," *Clothing & Textiles Research Journal*, 2003, 21 (4), 174-184
- Lee, J., & J. Marlowe "How consumers choose a financial institution: Decision-making criteria and heuristics," *International Journal of Bank Marketing*, 2003, 21 (2), 53-71
- Lee, J., & H. Kim "An examination of the impact of health on wealth depletion of the elderly," *Journal of Gerontology: Social Science*, 2003, 58B (2), S120-S126, PMID: 12646601.
- Hogarth, J.M., C.E. Anguelov, & J. Lee "Why households don't have checking accounts," *Economic Development Quarterly*, 2003, 17 (1), 75-94
- Lee, J., & E-J. Kim "Consumer protection for the elderly," In Vitt, L. (ed.), *The Encyclopedia of Retirement and Finance*, 2003, Institute for Socio-Financial Studies, Middleburg, VA: Green Publisher: 119-123
- Lee, J. "The poor in the financial market: Changes in the use of financial products, institutions, and services from 1995 to 1998," *Journal of Consumer Policy*, 2002, 25 (2), 203-231
- Li, Y.M., J. Lee, & B. Cude "Intention to adopt online trading: Identifying the future online traders," *Financial Counseling and Planning*, 2002, 13 (2), 49-64
- Lee, J., & K. Kwon "Consumers' use of credit cards: Store credit card usage as an alternative payment and financing medium," *Journal of Consumer Affairs*, 2002, 36 (2), 239-262
- Lee, E-J., D. Schumann, & J. Lee "The influence of communication source and mode on consumer adoption of technological innovations," *Journal of Consumer Affairs*, 2002, 36 (1), 1-27
- Lee, J. "A key to marketing financial services: The right mix of products, services, channels, and customers," *Journal of Services Marketing*, 2002, 16 (3), 238-256
- Lee, E-J., & J. Lee "Consumer adoption of Internet banking: Need-based and/or skill-based," *Marketing Management Journal*, 2001, 11, 101-113
- Lee, E-J., & J. Lee "Credit choices: An examination of consumer approval for the financing of luxury items and education," *Journal of Consumer Education*, 2001, 19/20, 25-34
- Lee, J., J. Kolodinsky, J. Nam, & M. Drzewiczewski "Degree of frailty and elders' satisfaction with personal care services in a community setting," *Journal of Consumer Satisfaction, Dissatisfaction & Complaining Behavior*, 2001, 14:154-165

- Hogarth, J.M., M.A. Higert, J.M. Kolodinsky, & J. Lee "Consumer credit card complaints: An exploration of consumer complaining behavior," *Journal of Consumer Satisfaction, Dissatisfaction, and Complaining Behavior*, 2001, 14:88-107
- Lee, J. "Consumer fraud," *Journal of Public Policy & Marketing*, 2000, 19 (1): 153-154
- Lee, J., & J.M. Hogarth "Shopping for a mortgage loan: The search for information," *Financial Services Review*, 2000, 9 (3), 277-293
- Lee, J., & J.M. Hogarth "Relationships among information search activities when shopping for a credit card," *Journal of Consumer Affairs*, 2000, 34 (2): 330-360
- Lee, E-J. & J. Lee "Haven't adopted electronic financial services yet? The acceptance and diffusion of electronic banking technologies," *Financial Counseling and Planning*, 2000, 11(1): 49-60
- Moore, M., & J. Lee "The vulnerable elderly consumer: An actual victim profile," *Journal of Consumer Education*, 2000, 18: 28-34
- Lee, J., & L.V. Geistfeld "Elderly consumers' receptiveness to telemarketing fraud," *Journal of Public Policy & Marketing*, 2000, 18 (2): 208-217
- Lee, J., & J.M. Hogarth "Returns to information search: Consumer credit card shopping decision," *Financial Counseling and Planning*, 1999, 10 (2): 23-34
- Lee, J., & J.M. Hogarth "Returns to information search: Consumer mortgage shopping decision," *Financial Counseling and Planning*, 1999, 10 (1): 49-66
- Lee, J., & J.M. Hogarth "The price of money: Consumers' understanding of APRs and contract interest rates," *Journal of Public Policy and Marketing*, 1999, 18 (1): 66-76
- Lee, J., & H. Soberon-Ferrer "An empirical analysis of elderly consumers' complaining behavior," *Family & Consumer Science Research Journal*, 1999, 27 (3): 341-371
- Reardon, J., D. Dalenberg, J. Wicks, & J. Lee "Are families rational in their make or buy decisions?" *Journal of Business and Economic Studies*, 1999, Spring, 17-32
- Reardon, J., D. Dalenberg, J. Wicks, J. Alexander, & J. Lee "Production and consumption of goods and services within the household and the effects on marketing strategies," *Journal of Business and Economic Perspectives*, 1999, XXV (2): 71-84
- Lee, J., & L.V. Geistfeld "Enhancing consumer choice: Are we making appropriate recommendations?" *Journal of Consumer Affairs*, 1998, 32 (2): 227-250
- Fan, J.X., J. Lee, & S. Hanna "Are apparel trade restrictions regressive?" *Journal of Consumer Affairs*, 1998, 32 (2): 250-272
- Lee, J., Hanna, S., C.F.J. Mok, & H. Wang "Apparel expenditure patterns of elderly consumers: A life-cycle consumption model," *Family and Consumer Science Research Journal*, 1998, 26 (2): 109-140
- Lee, J., & H. Soberon-Ferrer "Consumer vulnerability to fraud: Influencing factors," *Journal of Consumer Affairs*, 1998, 31 (1): 70-89
- Lee, J., & K-C. Rhee "Review of consumer activism in Korea," 1910-1995: A political economic approach. *Journal of Consumer Policy*, 1998, 19: 365-392

Book Chapters

- Fonseca, R., A. Kapteyn, J. Lee, G. Zamarro, & K. Feeney, "Financial and subjective well-being of older Europeans," In *Active Ageing and Solidarity between Generations in Europe: First results from*

- SHARE after the Economic Crisis*, 2013, A. Borsch-Supan, M. Brandt, H. Litwin, and G. Weber (eds.), Berlin, Germany: De Gruyter, 137 - 146.
- Arokiasamy, P., D. Bloom, J. Lee, S. Parasuraman, K. Feeney, & M. Ozolins “Longitudinal Study on Aging in India: Vision, Design, Implementation, and Preliminary Findings,” In *Aging in Asia: Findings from New and Emerging Data Initiatives*, Committee on Policy Research and Data Needs to Meet the Challenge of Aging in Asia, 2012, J.P. Smith and M. Majmundar (eds.), Washington, DC: the National Academy Press, 36 – 74.
- Lee, J., P. Arokiasamy, A. Chandra, P. Hu, J. Liu, K. Feeney “Markers and Drivers: Cardiovascular Health of Middle-Aged and Older Indians,” In *Aging in Asia: Findings from New and Emerging Data Initiatives*, Committee on Policy Research and Data Needs to Meet the Challenge of Aging in Asia, 2012, J.P. Smith and M. Majmundar (eds.), Washington, DC: the National Academy Press, 389 – 416.
- Lee, J., & D. Phillips “Income and Poverty among Older Koreans: the Role of Public and Family Transfers,” In *the Family, the Market or the State? Intergenerational Support under Stress in Ageing Societies*, 2012, G. De Santis (ed.), Springer, 99 – 121.
- Fonseca, R., J. Lee, G. Zamarro, J. Zissimopoulos “Poverty of the Aging Population: a Cross-country analysis,” In *Social Statistics, Poverty and Social Exclusion: Perspectives from Quebec, Canada, and Abroad*. Presses, 2011, Fréchet, Guy, Danielle Gauvreau et Jean Poirier (eds.), Presses de l’Université de Montréal.
- Lee, J., J. Cho, & M. Abdul-Rahman “E-banking,” In J. J. Xiao (ed.), *Advances in Consumer Financial Behavior Research*, 2007, New York, NY: Springer, 105 – 124.
- Schumann, D., Lee, J., & T. Watchravesringkan “The case for separation of Asian American ethnic groups as we consider our target-market strategies,” In *Diversity in Advertising: Broadening the Scope of Research Directions*, Jerome D. Williams, W-N. Lee, & C. P. Haugtvedt (eds.), 2004, Mahwah, NJ: Lawrence Erlbaum Associates, Inc: 341-355
- Hogarth, J.M., & J. Lee “Use of financial services and the poor,” In M. Sherradden & L. Johnson (eds.) *Inclusion in Asset Building*, 2001, St. Louis, MO: Center for Social Development, St. Louis University
- Rhee, K-C., & J. Lee “South Korean consumer movement,” In Brobeck, S., R. Mayer & R. Herrmann (eds.), *The Encyclopedia of the Consumer Movement*, 1998, Consumer Federation of America, Santa Barbara, CA: ABC Clio, 522-525
- Monographs and Working Papers**
- Harmonization of Cross-National Studies of Aging to the Health and Retirement Study: Health Behavior, *RAND Working Paper Series WR-861/8*, 2015 (with S. Wang & J. Min)
- Education, Gender, and State-Level Gradients in the Health of Older Indians: Evidence from Biomarker Data, the CESR-Schaeffer Working Paper No. 2014-007, University of Southern California, 2014 (with M. McGovern, D.E. Bloom, P. Arokiasamy, A. Risbud, V. Kale, J. O’Brien, & Peifeng Hu)
- Harmonized JSTAR Documentation, Version A, USC Davis Center for Global Aging Research, 2014 (with H. Matsuyama, D. Phillips, S. Chien, & H. Ichimura)
- Harmonized SHARE Documentation, Version B, USC Davis Center for Global Aging Research, 2014 (with D. Phillips, S. Chien, M. Angrisani, E. Meijer)
- Longitudinal Aging Study in India: Biomarker Data Documentation, *RAND Working Paper WR-1043*, 2014 (with D.E. Bloom, P. Hu, P. Arokiasamy, A. Risbud, T.V. Sekher, S.K. Mohanty, V. Kale, J. O’Brien, & S. Chien)

Health effects of the recent financial crisis: Has wealth loss contributed to chronic disease treatments and outcomes? *RAND Working Paper WR-1030*, 2014 (with M. Angrisani, S. Kadiyala, & J. Lee)

Dimensions of subjective wellbeing, *CESR Working Paper Series*, 2013, 2013.005 (with A. Kapteyn, C. Tassot, H. Vonkova, & G. Zamarro)

Harmonized LASI Pilot Data Documentation, Version A, RAND Corporation, 2013 (with S. Chien, K. Feeney, J. Liu, & E. Meijer)

RAND ELSA Data Documentation, Version B, RAND Corporation, 2012 (with D. Phillips, S. Chien, M. Moldoff, & G. Zamarro)

Does Retirement Induced Through Social Security Pension Eligibility Influence Subjective Wellbeing? A Cross-Country Comparison, *MRRC Working Paper Series*, 2013, 2013.301 (with A. Kapteyn & G. Zamarro)

“Population aging in India, Burden or Opportunity?” *Boao Review*,
<http://www.boaoreview.com/Opinions/Public/20130724/264.html>

RAND Harmonized KLoSA Data Documentation: Alpha, RAND Corporation, 2011 (with D. Phillips & K. Feeney)

Harmonization of Cross-National Studies of Aging to the Health and Retirement Study: Chronic Medical Conditions, *RAND Working Paper Series WR-861/1*, 2011 (with P.Hu)

Harmonization of Cross-National Studies of Aging to the Health and Retirement Study: Financial Transfer, *RAND Working Paper Series WR-861/2*, 2011 (with J. Zissimopoulos, J. Carroll)

Harmonization of Cross-National Studies of Aging to the Health and Retirement Study: Expectations, *RAND Working Paper Series WR-861/3*, 2011 (with A. Delavande, J. Yoong)

Harmonization of Cross-National Studies of Aging to the Health and Retirement Study: Employment and Retirement Measures, *RAND Working Paper Series WR-861/4*, 2011 (with G. Zamarro)

Harmonization of Cross-National Studies of Aging to the Health and Retirement Study: Income Measures, *RAND Working Paper Series WR-861/5*, 2011 (with M. Angrisani)

Harmonization of Cross-National Studies of Aging to the Health and Retirement Study: Wealth Measures, *RAND Working Paper Series WR-861/6*, 2011 (with M. Angrisani)

Harmonization of Cross-National Studies of Aging to the Health and Retirement Study: Cognition, *RAND Working Paper Series WR-861/7*, 2011 (with R.A. Shih, L. Das)

Cognitive Health of Older Indians: Individual and Geographic Determinants of Female Disadvantage,” *RAND Working Paper Series WR-889*, 2011 (with Shih, R.A., Feeney, K.C., & Langa, K.M)

Employment Status, Quality of Matching, and Retirement in Korea: Evidence from the Korean Longitudinal Study on Aging, *RAND Working Paper WR-834*, Rand Corporation: Santa Monica, 2011, CA (with C. Lee)

What is the Cost of Married Women’s Paid Work? *RAND Working Paper, WR-830*, Rand Corporation: Santa Monica, CA, 2010 (with S. Lee & Y. Chang)

Disability of Older Koreans: Evidence on Prevalence and the Role of Education from Five Data Sets, *RAND Working Paper, WR-811*, Rand Corporation: Santa Monica, CA, 2010 (with J. Kim).

Pre- and Post-Retirement Asset Portfolios, Madison, WI: Filene Research Institute, 2010 (with A. Kapteyn, E. Meijer, & J-S. Yang)

Credit Union Implications for Living Trusts, Madison, WI: Filene Research Institute, 2010 (with A. Kapteyn, J-S. Yang & C. Sharon)

Harmonizing Aging Surveys and Cross-National Studies of Aging, National Institute on Aging, National Institutes of Health, 2009

Consumer Use of Banks and Credit Unions: Findings from a survey for California and Nevada Credit Union Leagues, RAND Technical Report TR-672, 2009 (with T. Mattox, K-N. Kwon, A. Kapteyn & T. Gutsche)

Attracting Young Adults: What Do We Know About Their Use of Financial Institutions and Payment Behaviors, Madison, WI: Filene Research Institute, 2008

Harmonizing Aging Surveys and Cross-National Studies of Aging, National Institute on Aging, National Institutes of Health, 2007, <http://www.nia.nih.gov/NR/rdonlyres/AF0997F6-0C16-4A76-96C0-D3780F00E6D4/7338/ESummary.pdf>.

Who Uses Credit Unions? The 4th Edition, Madison, WI: Filene Research Institute, 2007

Gifts that Connect Generations: A Role for Credit Unions. Madison, WI: Filene Research Institute, 2004 (with W. Kelly)

Building Savings Per Member at Credit Unions. Madison, WI: Filene Research Institute, 2004 (with W. Kelly)

Inheritances: Who Expects to Leave Money to Heirs? Madison, WI: Filene Research Institute, 2004 (with W. Kelly)

Who Uses Credit Unions? The 3rd Edition, Madison, WI: Filene Research Institute, 2004 (with W. Kelly)

Segmentation Key to Marketing CU Checking Accounts, *Credit Union Executive Center*, 3/10/2003 (with W. Kelly)

Professional Financial Advice for Consumers: Implications for Credit Unions, Madison, WI: Filene Research Institute, 2003 (with W. Kelly)

Uninsured Accounts: An Assessment of Member Interest, Madison, WI: Filene Research Institute, 2003 (with W. Kelly)

Marketing Checking Accounts to Members: A Guide for Credit Unions, Madison, WI: Filene Research Institute, 2003 (with W. Kelly)

Life-Cycle Marketing for Credit Unions: Volume I, II, III, IV. Madison, WI: Filene Research Institute, 2001, 2002 (with W. Kelly)

Who Uses Credit Unions? The 2nd Edition, Madison, WI: Filene Research Institute, 2001 (with W. Kelly)

Where Are Consumers' Financial Assets? Madison, WI: Filene Research Institute, 2001 (with W. Kelly)

Marketing financial services: In-person selling versus direct marketing. *MacroMonitor Marketing Report*, 7 (7), Princeton, NJ: Consumer Financial Decisions, SRI Consulting, Subsidiary of SRI International, 2000 (with W. Kelly)

The Human Touch in the Information Age: What Do Members Want? Madison, WI: Filene Research Institute, 2000 (with W. Kelly)

Who Uses Credit Unions? Madison, WI: Filene Research Institute, 1999 (with W. Kelly)

GRANTS AND CONTRACTS

Grants

- National Institutes of Health/National Institute on Aging (NIH/NIA) R24AG048024, “Advancing Psychosocial & Biobehavioral Stress Measurement to Understand Aging” (Co-PI) 2014 – 2019 (\$1,390,513)
- NIH/NIA 1R01 AG042778, “The Longitudinal Aging Study in India, LASI” (PI) 2013 – 2018 (\$8,351,028)
- NIH/NIA 2R01 AG030153, “Integrating Information about Aging Surveys” (PI) 2012 – 2017 (\$5,342,736)
- NIH/NIA 2P01AG022481 “International Comparisons of Well-being, Health and Retirement” (Data Core Leader, Co-investigator) 2010 – 2016 (\$2,388,432)
- NIH/NIA 2P30 AG017265-15, “SES Gradients of Metabolic Syndrome in China and India” (PI of the pilot grant funded by P30) 2014 – 2015 (\$20,563)
- NIH/NIA R24AG037866, “Harmonization of Cross-national Studies of Aging to the Health and Retirement Study” (PI) 2010 – 2015 (\$1,129,251)
- Social Security Administration (SSA) MRRC 2013-14, “Is Working Longer Good for You? A Simultaneous Equations Approach” (Co-PI) 2013 – 2014 (\$75,000)
- SSA MRRC 2012-0828, “Would delaying Social Security eligibility age influence subjective well-being?” (Co-PI) 2012 – 2013 (\$50,000)
- NIH/National Institute of Dental and Craniofacial Research (NIDCR) 9R01DE021678-04A1, “Dental Coverage Transitions, Utilization and Retirement” (Co-investigator) 2012 – 2013 (\$71,836)
- NIA/NIA R21AG034443-A2, “Longitudinal Aging Study in India (LASI) Biomarker” (PI) 2011 – 2014 (\$391,790)
- NIH/NIA R03AG043052-01, “Archiving & Creating User Friendly Data: LASI” (PI) 2012 – 2013 (\$94,941)
- NIH/NIA P30AG012815, “Health Effects of Physical Environment, SES, and Gender Discrimination in India” (PI of a pilot project funded by P30) 2012 – 2013 (\$50,000)
- NIH/NIA RC2AG036619, “Mega Meta Data Set of the Health and Retirement Surveys around the World” (co-PI) 2009 – 2011 (\$2,011,105)
- NIH/National Institute on Child Health and Human Development (NICHD) RC1HD063405, “Behavioral and Clinical Research in a Long-running Longitudinal Survey” (PI) 2009 – 2011 (\$995,047)
- NIH/NIA R21AG032572, “Health and Retirement Survey for India” (Co-PI) 2008 – 2010 (\$400,919)
- NIH/NIA R21AG027288, “Harmonizing Korean Longitudinal Study of Aging” (PI) 2007 – 2008 (\$109,941)
- NIH/NIA and Office of Behavioral & Social Science Research R13 AG032771, “China & India Conferences for Harmonization of Aging Surveys” (PI) 2008 – 2010 (\$65,850)
- NIH/NIA K01AG021531, “A Multi-disciplinary Approach to Wealth Transfers” (PI) 2004 – 2009 (\$620,835)
- Ohio State University, Targeted Investment in Excellence, “Panel Study of Asian Americans” (PI) 2007 – 2008 (\$200,000)

NIH/NIA and Fogarty International Center U13 AG029801, “Harmonization of Aging Surveys and Cross-National Studies on Aging” (PI) 2006-2007 (\$41,244)

Contracts

Filene Research Institute, “Pre- and Post-Retirement Asset Changes” (PI) 2008-2010

Korean Genome Center, Korean National Institute of Health, “Community-Based Cohort Study, Ansan-Ansung” (Co-investigator) 2007 – 2009

Filene Research Institute, “The Poor in the Financial Market” (PI) 2006-2007

The Korean Ministry of Labor, “Korean Longitudinal Study on Aging” (Co-PI) 2005 – 2006

Center for Credit Union Research, "Intergenerational Wealth Transfers" (PI) 2002-2003

The Federal Reserve Bank of Atlanta, "Financial Literacy: Challenges, Current States, and Future Strategies" (PI) 2001

Center for Credit Union Research, “How Consumers Choose a Financial Institution: Perceptions, Process, and Criteria” (PI) 2000-2001

The Department of Elder Affairs, Florida, “Consumer Satisfaction with State Provided Long-Term Care Services” (PI) 1999-2001

Filene Research Institute “Consumer Financial Assets & Loan Portfolio: Life-Cycle Stage Analysis” (PI) 1999-2000

Federal Reserve Board, "Shopping for Credit Card & Mortgage Loan: Information Searched & Information Wanted” (PI) 1999

American Association of Retired Persons, “Consumer Awareness of Telemarketing Fraud: The Analysis of 1996, 1997, and 1998 National and State Data Sets” (PI) 1998-1999

Federal Reserve Board, “Analysis of Consumer Credit and Mortgage Shopping Behavior in Reference to the Truth-in-Lending and the Real-Estate Settlement Procedures Act” (PI) 1997

INVITED PRESENTATIONS

2014

RIETI-JER Workshop on Economics of Aging in Japan and Other Societies, the Research Institute of Economy, Trade, and Industry, Tokyo, Japan

KIHASA-Oxford-Birmingham Conference on Responses to Structural Population Change in East Asia and Europe, the Korean Health and Social Affairs, Jeju, South Korea

The University of California, Irvine Population Center, Irvine, CA

RAND Summer Institute, RAND Corporation, Santa Monica, CA

University of Erasmus School of Health Policy, Rotterdam, Netherland

European Population Conference, Budapest, Hungary

Population Association of America, Boston, MA

Beijing Aging Forum, Chinese Center for Economic Research, Beijing University, Peking, China

Conference on Challenges of Population Aging in Asia, Hong Kong University of Science and Technology, Institute for Emerging Market Studies and the World Bank, Hong Kong, China

The Cognitive Harmonization Meeting, National Institute on Aging, Bethesda, MD

2013

The 15th Annual Conference of the Retirement Research Consortium, Social Security Administration, Washington DC

RAND Summer Institute, RAND Corporation, Santa Monica, CA

Korea Employment Information Services Symposium, Seoul, S. Korea
The Irish Longitudinal Study on Ageing Scientific Meeting, Dublin, Ireland
University of Michigan Retirement Research Center Research Workshop, Ann Arbor, MI
Population Association of America Annual Meeting, New Orleans, LA
Economic Aspects of Population Aging in China and India, Stanford University, Palo Alto
Survey of Health, Ageing, and Retirement in Europe Meeting, Munich, Germany

2012

Gerontological Society of America Annual Meeting, San Diego, CA
ELSA (English Longitudinal Study on Ageing) International Consultants Meeting, London, England
European Society of Population Economics Annual Meeting, Bern, Switzerland
NIA Stress Measurement Meeting, University of Southern California, Los Angeles, CA
University of Manchester, School of Social Science, Manchester, England
Oxford Institute of Population Aging, University of Oxford, England
The Health and Retirement Study Workshop, SRC Summer Institute in Survey Research Techniques, Ann Arbor, MI
Population Association of America Annual Meeting, San Francisco, CA
NIA Workshop on Harmonization Strategies for Genetic Studies in the Behavioral and Social Sciences, Bethesda, MD

2011

Gerontological Society of America, Boston, MA
The 2nd Workshop of the Social Science Genetic Association Consortium, Los Angeles, CA
New Directions in Survey Measurement of Subjective Wellbeing, HRS-ELSA Well-being Workshop 2, Ann Arbor, MI
RIETI-RAND Symposium, the Research Institute of Economics, Trade, and Industry, Tokyo, Japan
The Health and Retirement Study User Workshop, the University of Michigan, Ann Arbor
Harmonization of Methods and Measures in Longitudinal Studies, the University of Southern California and University of California, Los Angeles
The Future of South Asia, South Asia Initiative at Harvard University, Cambridge, MA
Population Association of America Annual Meeting, Washington, DC
Canadian Data Harmonization Roundtable, the Canadian Institutes of Health Research (CIHR), Genome Canada and the Social Sciences and Humanities Research Council (SSHRC), Ottawa, Canada
International Conference on Policy Research and Data Needs to Meet the Challenges and Opportunities of Population Aging in Asia, the National Academy of Science and the Indian National Academy of Science, Delhi, India

2010

English Longitudinal Study of Aging (ELSA) Technical Advisory Meeting, London, England
Paris School of Economics, France
International Union for the Scientific Study of Population (IUSSP) Conference, Geneva, Switzerland
Population Association of America Annual Meeting, Dallas, TX

Prior to 2010

Seminar on Family Supports and Population Ageing, United Nations Programme on Ageing, Doha, Qatar, 2009
Indo-US Science and Technology Forum, Delhi, India, 2009
English Longitudinal Study of Aging User Day, University College London, 2008
Research Institute of Economy, Trade, and Industry (RIETI), Tokyo, Japan, 2008
Korean Women's Development Institute, Seoul, S. Korea, 2007
The Seminar on Aging in Developing Countries: Building Bridges for Integrated Research Agendas, United Nations, Santiago, Chile, 2007
Korean Genome Center, Korea National Institute of Health, 2007

Research Frontiers of Genetic, Social, and Environmental Determinants of Healthy Longevity, Peking University, China, 2006
 The Seoul Aging Research Institute, Seoul National University, South Korea, 2006
 The Research Institute of Economy, Trade and Industry, Tokyo, Japan, 2006
 Korea Women's Development Institute, 2006
 Samsung Research Institute of Finance, Seoul, S. Korea, 2006
 The Korean Ministry of Health and Welfare, S. Korea, 2006
 School of Public Health, Seoul National University, S. Korea, 2006
 University of Aarhus, Copenhagen University, The Danish National Institute of Social Research, and Institute of Local Government Studies, Arhus, Denmark, 2005
 Korea Labor Institute, Seoul, S. Korea, 2004
International Conference on Healthy Aging and Socioeconomic Development in China. Duke University, Durham, NC, 2004
 The Presidential Committee on Population Ageing and Future Society, Seoul, Korea, 2004
 The Korea Institute for Health and Social Affairs, Seoul, Korea, 2004
 Filene Research Colloquium, Charlottesville, VA, 2003
 Credit Union Research Council, 1998, 2000, 2002, 2003
Inclusion in Asset Building: Research and Policy Symposium, Center for Social Development, Washington University, St. Louis, MO, 2000
Public Forums on Simplifying and Streamlining the Truth in Lending Act and the Real Estate Settlement Procedures Act, The Board of Governors of the Federal Reserve System and the Housing and Urban Development, Washington, DC, 1997

TEACHING

Ohio State University

- Economics of Aging (Ph.D.) (2005, 2007)
- Consumer & Public Policy (Ph.D.) (2004, 2006)
- Retirement Planning & Employee Benefits (2004)

University of Georgia

- Retirement Planning & Employee Benefits (2002)
- Family Financial Management (2001)
- Research Method (Ph.D) (2001 – 2002)

University of Wisconsin, Madison

- Consumer Behavior (2000)
- Marketing Research (MBA) (2000 – 2001)

University of Tennessee, Knoxville

- Consumer Economics (1993-1999)
- Consumer Economics (Ph.D.) (1993, 1995, 1996, 1998)
- Research Methods (Ph.D.) (1998 – 1999)
- Strategic Decision Making at UTK, 1999

ADVISING

Postdoctoral Training

- Joohong Min (2014 – present)
- Michio Yuda (2013 – 2014) Chukyo University, Japan

- Jane Cramm (2013) University of Erasmus School of Health Policy, Rotterdam, Netherland
- Jenny Liu (2011 – 2013) University of California, San Francisco
- Hyungsoo Kim (2000 – 2002) University of Kentucky

Directed Ph.D./Master's Dissertation for

- Youngae Lee (2008) Incheon National University, S. Korea
- Abdul-Rahman, Mohamed Fahzy (2007) New Mexico State University
- Lin, Catherine Qihua (2002) Southern Methodist University
- Li, Mickey Yinghao (2001) Citibank
- Eunju Lee (2000) Seongkyunkwan University, S. Korea
- Watchravesringkan, Tu (1999) University of North Carolina
- Daves, Hester (1998) Carlson Newman College
- Tipper, Ronnie (1997)

PROFESSIONAL SERVICES

Served as reviewer for

- Special Emphasis Panels and ad-hoc review for the National Institutes of Health, including National Institute on Aging (NIA), National Institute of Diabetes and Digestive and Kidney Diseases (NIDDK), Agency for Healthcare Research and Quality (AHRQ), since 2006
- International Funding Agencies, including the Community Research and Development Information Service (CORDIS), European Commission, 2010, the Canadian Institute of Health Research, since 2011
- Editorial Board and Guest Editor, *Journal of Consumer Affairs* (2001-2005) and *Journal of Population Aging* (2013)
- *Journal of American Geriatrics Association, Berkley Journal of Economics, Social Science & Medicine, Journal of Aging and Social Policy, Journal of Aging and Human Development, Demography, Journal of Consumer Policy, Journal of Family and Economic Issues, Financial Counseling and Planning Journal, Population Research & Policy Review, Journal of Gerontology: Social Sciences, Journal of Health and Social Behavior, Journal of Economics of Aging*

Served as committee member for

- Professional Societies, including the Population Association of America, the Gerontological Society of America meeting, the American Council on Consumer Interests Annual Conference
- Ohio State University – the Steering Committee for the Population and Health Targeted Investment of Excellence Initiative, Advisory Committee for the Center for Human Resources Research and the Initiative in Population Research, and Advisory Committee for the Office of Research
- University of Georgia, Athens, Curriculum Committee
- University of Tennessee, Knoxville – Faculty Counselor to the President; Undergraduate Coordinator; and Curriculum Committee