**RECENT STANLEY SURREY JUNIOR FELLOW EXPERIENCES[[1]](#endnote-1)**

**OTA General Duties**

* Organizing, editing, and proofreading large sets of documents that describe the tax proposals included in President’s annual Budget submission.
* Managing FOIA requests directed to OTA.
* Managing OTA’s postings to Treasury’s public web site.
* Assisting OTA economists in gathering data, making tables and visualizations, and assisting them with policy work and research projects.

**OTA Projects (with Senior Economists)**

* Reading financial statements of public corporations and combing through public and confidential tax data to identify affiliates of foreign- and U.S.-parented companies.
* Using Stata, to analyze and visualize complex estimation results on housing tax benefits for over 3,000 counties in the U.S. before and after the enactment of TCJA.
* Estimating the U.S. revenue effects of proposed tax legislation such as the refundability of the Adoption Tax Credit and the repeal of FOGEI from GILTI.
* Creating a data base of state-specific income tax parameters.
* Developing a new tax-exempt interest forecasting model.
* Managing the Federal excise tax trust funds.
* Developing an income tax treaty database now used by United States treaty negotiators.
* Measuring and Analyzing tax expenditures and the distribution of the ownership of U.S. corporate equities.
* Modeling OECD Pillar 1 scoping criteria and different iterations with senior economists to determine the optimal criteria.
* Modeling revenue estimates for the OECD’s Pillar 2 project with economists to aid in ongoing U.S. negotiations.

**OTA Research (with Senior Economists)**

* The business reasons behind charitable donations by pharmaceutical companies.
* Compensation boards favoring executives over shareholders.
* Increasing supernormal returns of corporations over time.
* The tax implications of the earnings of social media influencers.
* Profit-shifting behavior of U.S. firms acquired by foreign companies in cross-border merger and acquisition (M&A) deals.
* The economic effects of wrongful incarceration on the incarcerated and their families.
* Indian Tribal Access to Tax-Exempt Bond Financing.
* Take-up of the American Opportunity Tax Credit by students.
* The effect of the closure of the Double Irish loophole on the profit-shifting behavior of U.S. multinationals.
* Estimating the amount of offshore profit held by non-profit organizations.

**Publications, Conference Presentations and Reports while at OTA (with Senior Economists)**

* Articles published in Tax Notes
* Papers published in *The National Tax Journal*
* Presentations at the OTA Tax Conference
* Presentations at the National Tax Association Conferences
* Presentation at the Society for Government Economists Conference
* Memos for the Secretary of the Treasury
* Reports for Congress

**Post OTA Graduate School (including those currently pursuing their degree)**

* Master of Data Science, Northwestern University
* Master of Public Policy, George Washington University
* Ph.D. in Accounting, University of Pennsylvania Wharton School of Business
* Ph.D. in Economics, University of California, Irvine
* Ph.D. in Economics, University of California, Davis
* Ph.D. in Economics, University of Texas at Austin
* J.D. Harvard Law

**Post OTA Positions**

* Pre-doctorate, Dartmouth University
* Deputy Director, Thurman Arnold Project, Yale University
* Assistant Professor, Dickenson College
* Assistant Professor, UCLA Anderson School of Management
* Assistant Professor, Davidson College
* Law Associate, Covington & Burling LLP

1. The experiences listed in this document, both at OTA and after working at OTA, are actual experiences of past and current OTA Surrey Fellows. This list is intended to give prospective applicants a better sense of the position. The tasks, duties, projects, and research experiences of future Surrey Fellows may be different than those of past Fellows. [↑](#endnote-ref-1)