KATHLEEN McGARRY
Curriculum vitae

Office Address:

Department of Economics
University of California, Los Angeles
Los Angeles, CA 90095-1477
email: mcgarry@ucla.edu

Current/Past Positions:

Vice Chair, Department of Economics, UCLA, 2017-present
Chair, Department of Economics, UCLA, 2013-2017
Vice Chair, Department of Economics, UCLA, 2009-2013
Professor, Department of Economics, UCLA, 2004-present
Joel Z. and Susan Hyatt '72 Professor, Department of Economics, Dartmouth College, 2007-2009
Research Associate, National Bureau of Economic Research, 1999-present
Associate Professor, Department of Economics, UCLA, 1999-2004
Senior Economist, White House Council of Economic Advisers, 2000-2001
Assistant Professor, Department of Economics, UCLA, 1992-1999
Faculty Research Fellow, National Bureau of Economic Research, 1993-1999

Education:

Ph.D. Economics, State University of New York, Stony Brook
B.S. Mathematics (*summa cum laude*), State University of New York, Stony Brook

Major Fields of Concentration:

Economics of Aging, Health Economics, Public Economics

Fellowships and Awards:

Phi Beta Kappa, National Senator at Large, 2018-present
Phi Beta Kappa, Visiting Scholar, 2014-2015
Warren C. Scoville Distinguished Teaching Award, 1994, 1997, 1998, 2000, 2010, 2011
NBER National Fellowship, 2001-2002
Dean's Marshall Award, Outstanding Assistant Professor in the Social Sciences, 1997
Brookdale Fellowship, 1995-1998
NBER Fellowship in Aging and Health Economics, 1994-1995
Kalman Fellowship for Graduate Study, 1987, 1988, 1989
Stony Brook Foundation Award for the Outstanding Student in Mathematics, 1986
Stony Brook Foundation Award for the Outstanding Student in Economics, 1986

Publications:

"Parental Investments in College and Later Cash Transfers," (with Steven Haider), 2018. *Demography,* 55 (5) : 1705-1725.

"Three Generations of Changing Gender Patterns for Schooling in China," (with Xiaoting Sun), 2018. *Journal of the Asia Pacific Economy,* 23 (4) : 584-605.

"Measuring and Modeling Intergenerational Links in Relation to Long-Term Care," (with Andrew Caplin and Mi Luo), 2018. *Economic Inquiry,* 56 (1) : 100-113.

"Women Working Longer: Labor Market Implications of Providing Family Care," (with Sean Fahle), 2018. In *Women Working Longer: Increased Employment at Older Ages,* Claudia Goldin and Lawrence F. Katz, eds. Chicago, University of Chicago Press, 157-184.

"Post-secondary Schooling and Parental Resources: Evidence from the PSID and HRS" (with Steven Haider), 2018. *Education and Finance Policy,* 13 (1) : 72-96.

"Living Arrangements of Mothers and Their Adult Children over the Life Course" (with Emily Wiemers, V. Joseph Hotz, and Vladislav Slanchev), 2017. *Research on Aging,* 39 (1) : 111-134.

"Out-of-Pocket Medical Expenditures in the United States: Evidence from the Health and Retirement Study" (with Sean Fahle and Jonathan Skinner), 2016. *Fiscal Studies,* 37 (3-4) : 785-819.

"Dynamic Aspects of Family Transfers," 2016. *Journal of Public Economics,* 137 : 1-13.

"Consumption and the Extended Family" (with Hwajung Choi and Robert Schoeni), 2016. *Economic Letters,* 140 : 34-38.

"Heterogeneity in State-Dependent Utility: Evidence from Strategic Surveys"(with Jeffrey R. Brown and Gopi Shah Goda), 2016. *Economic Inquiry,* 54 (2) : 847-861.

"The Burden of Health Care Costs for Patients with Dementia in the Last 5 Years of Life" (with Amy Kelley, Rebecca Gorges and Jonathan Skinner), 2015. *The Annals of Internal Medicine,* 163 (10): 729-736.

"The Estate Tax and Inter Vivos Transfers over Time," 2013. *The American Economic Review: Papers and Proceedings,* 103 (3) : 478-483.

"The Social Safety Net for the Elderly," 2013. In *The Legacy of the War on Poverty,* Martha Bailey and Sheldon Danziger, eds. New York: Russell Sage, 179-205.

"Out-of-Pocket Spending in the Last Five Years of Life" (with Amy Kelley et al.), 2013. *Journal of General Internal Medicine,* 28 (2) : 304-309.

"Long-Term Care Insurance Demand Limited by Beliefs About Needs, Concerns About Insurers, And Care Available From Family" (with Jeff Brown and Gopi Shah Goda), 2012. *Health Affairs,* 31 (6): 1294-1302.

"State of the Science: Risk Factors and Therapeutic Interventions for Alzheimer Disease" (with Martha Daviglus et al.), 2011. *Archives of Neurology,* 68 (9): 1185-1190.

"The Risk of Out-of-Pocket Health Care Expenditures at the End of Life" (with Samuel Marshall and Jonathan S. Skinner), 2011. *Explorations in the Economics of Aging,* David A. Wise, ed. Chicago: University of Chicago Press: 101-128.

"Preventing Alzheimer Disease and Cognitive Decline" (with Martha Daviglus et al.), 2011. *Annals of Internal Medicine,* 154 (3): 176-181.

"Preference Heterogeneity and Insurance Markets: Explaining the Puzzle of Insurance" (with David Cutler and Amy Finkelstein), 2008. *The American Economic Review, Papers and Proceedings,* 98 (2): 157-162.

"Intergenerational Ties: Theories, Trends, and Challenges"(with Suzanne Bianchi, V. Joseph Hotz, and Judith Seltzer), 2008. In *Intergenerational Caregiving,* Alan Booth, Ann Crouter, Suzanne Bianchi and Judith Seltzer eds. Washington DC: Urban Institute Press, 3-43.

"Inheritance and Bequests," 2008. In *The New Palgrave Dictionary of Economics.* Steven Durlauf and Lawrence Blume, eds. London: MacMillan.

"Recent Trends in Resource Sharing among the Poor" (with Steven Haider), 2006. In *Working and Poor,* edited by Rebecca Blank, Sheldon Danziger, and Robert Schoeni, New York: Russell Sage, 205-232.

"Multiple Dimensions of Private Information: Evidence from the long-term care insurance market" (with Amy Finkelstein), 2006. *The American Economic Review* 96 (4): 938-958.

"Does Caregiving Affect Work? Evidence Based on Prior Labor Force Experience," 2006. In *Health Care Issues in the United States and Japan,* David A. Wise and Naohiro Yashiro (Eds.), Chicago: University of Chicago Press, 209-228.

"Dynamic Inefficiencies in Insurance Markets: Evidence from Long-Term Care Insurance" (with Amy Finkelstein and Amir Sufi), 2005. *The American Economic Review: Papers and Proceedings,* 95 (2): 224-228.

"Medicare Gaps and Widow Poverty" (with Robert Schoeni), 2005. *The Social Security Bulletin*, 66 (1): 58-74.

"Widow(er) Poverty and Out-of-Pocket Medical Expenses Near End of Life" (with Robert Schoeni), 2005. *Journal of Gerontology: Social Sciences,* 60B (3): S160-S169.

"Why Parents Play Favorites: Explanations for Unequal Bequests" (with Audrey Light), 2004. *The American Economic Review,* 94 (5): 1669-1681.

"Health and Retirement: Do Changes in Health Affect Retirement Expectations?" 2004. *Journal of Human Resources,* 39 (3): 624-648.

"Estate and Gift Tax Incentives and Inter Vivos Giving" (with David Joulfaian), 2004. *National Tax Journal,* LVII (2): 429-444.

"Public Policy and the U.S. Health Insurance Market: Direct and Indirect Provision of Insurance," 2002. *National Tax Journal,* LV (4): 789-827.

"The Predictive Validity of the Subjective Probabilities of Survival," (with Michael D. Hurd), 2002. *Economic Journal,* 112 (482): 966-985.

"Guaranteed Income: SSI and the Well-Being of the Elderly Poor," 2002. In *The Distributional Aspects of Social Security and Social Security Reform,* Martin Feldstein and Jeffrey Liebman eds. Chicago: University of Chicago Press: 49-79.

"The Cost of Equality: Unequal Bequests and Tax Avoidance," 2001. *Journal of Public Economics,* 79 (1): 179-204.

"Inter Vivos Transfers or Bequests? Estate Taxes and the Timing of Parental Giving," 2001. *Tax Policy and the Economy,* 14: 93-121.

"Behavioral Responses to the Estate Tax: Inter Vivos Giving," 2000. *National Tax Journal,* 53 (4): 913-932.

"Social Security, Economic Growth,and the Rise in Elderly Widows Independence in the 20th Century," (with Robert F. Schoeni), 2000. *Demography,* 37 (2): 221-236.

"Inter Vivos Transfers and Intended Bequests," 1999. *Journal of Public Economics,* 73 (3): 321-351.

"Job Change Patterns and the Wages of Young Men," (with Audrey Light), 1998. *The Review of Economics and Statistics,* 80 (2): 276-286.

"Pensions and the Distribution of Wealth" (with Andrew Davenport), 1998. In *Frontiers in the Economics of Aging,* David A. Wise ed., Chicago: University of Chicago Press, 463-485.

"Caring for the Elderly: The Role of Adult Children," 1998. In *Inquiries in the Economics of Aging,* David A. Wise ed., Chicago: University of Chicago Press: 133-166.

"Transfer Behavior Within the Family: Results from the Asset and Health Dynamics Study," (with Robert F. Schoeni), 1997. *The Journals of Gerontology,* 52B: 82-92.

"Medical Insurance and the Use of Health Care Services by the Elderly," (with Michael D. Hurd), 1997. *Journal of Health Economics,* 16 (2): 129-154.

"Factors Determining Participation of the Elderly in Supplemental Security Income," 1996. *The Journal of Human Resources,* 30 (2): 331-358.

"Evaluation of the Subjective Probabilities of Survival in the Health and Retirement Study" (with Michael D. Hurd), 1995. *The Journal of Human Resources,* 30: s268-s292.

"Transfer Behavior in the Health and Retirement Study: Measurement and the Redistribution of Resources within the Family," (with Robert F. Schoeni), 1995. *The Journal of Human Resources,* 30: s184-s226.

"Measurement Error and Poverty Rates of Widows," 1995. *The Journal of Human Resources,* 30 (1): 113-134.

Working Papers:

"Son Preference, Schooling, and Intergenerational Transfers in China: Are daughters narrowing the gap?," (with Xiaoyan Lei, Xiaoting Sun and Yaohui Zhao). September 2018.

"Understanding Participation in SSI," (with Robert Schoeni), August 2014. Presented at the 2014 Retirement Research Consortium Annual Meeting, National Press Club, Washington, DC.

"State-Dependent Utility and Insurance Purchase Decisions," (with Jeffrey R. Brown and Gopi Shah Goda), August 2013. Presented at the 2013 Retirement Research Consortium Annual Meeting, National Press Club, Washington DC.

"The Importance of Private and Government Safety Nets: A Comparison of Approved and Denied SSDI Applicants," (with Jonathan Skinner), August 2012. Presented at the Retirement Research Consortium Annual Meeting, National Press Club, Washington, D.C.

Published Comments:

Comment on "Noncompliance with the Federal Estate Tax," (by Martha Britton Eller, Brian Erard, and Chih-Chin Ho), in *Rethinking Estate and Gift Taxation*, William Gale, James Hines, and Joel Slemrod, eds. Washington D.C.: Brookings Institution Press, 2001: 411-421.

Comment on "Private Transfers within the Family: Mothers, Fathers, Sons, and Daughters," (by Donald Cox), in *Death and Dollars,* Alicia Munnell and Annika Sunden, eds. Washington D.C.: Brookings Institution Press, 2001: 202-209.

Editorial Service:

Editorial Boards: *American Economic Journal: Public Policy, Journal of Pension Economics.*

Referee/Reviewer for:

American Economic Review, American Journal of Health Economics, Berkeley Economic Journals, Contemporary Policy Issues, Demography, Economic Inquiry, Economic Journal, Economic Letters, Health Affairs, Inquiry, Journal of Behavioral and

Experimental Economics, Journal of Economic Behavior and Organization, Journals of Gerontology, Journal of Financial Economics, Journal of Health Economics, Journal of Human Resources, Journal of Labor Economics, Journal of Legal Studies, Journal of Political Economy, Journal of Public Economics, Journal of Risk and Insurance, Labour Economics, Millbank Memorial Foundation Quarterly, National Institutes on Health, National Science Foundation, National Tax Journal, Quarterly Journal of Economics, Review of Economics and Statistics, Social Security Bulletin, Southern Economic Journal.

Grants and Additional Support:

"Supporting Family Elder Care: An Analysis of the Labor Force Participation Effects and the Potential to Assist Caregivers through Public Support" (with Sean Fahle), *Sloan Foundation*, 2016-2019.

"Health and Retirement Study, Years 23-28" (with David Weir, et al., David Weir PI), 2018-2023.

"Examining the Relationship between Caregiving and Work" (with Sean Fahle), *Social Security Administration*, 2015-2016.

"Do Extended Family Linkages Reduce Retirement Wealth and Consumption?" (with Robert Schoeni), *Social Security Administration*, 2013-2014.

"Understanding Participation in SSI" (with Robert Schoeni), *Social Security Administration*, 2013-2014.

"How Much Do Retirees Value Consumption When Sick? State-Dependent Utility and Demand for Insurance" (with Jeffrey Brown and Gopi Shah Goda), *Social Security Administration,* 2012-2013.

"Health and Retirement Study" (with David Weir, et al., David Weir PI), *National Institute on Aging,* 2012-2017.

"The Importance of Private and Government Safety Nets: A Comparison of Approved and Denied SSDI Applicants," (with Jonathan Skinner), *Social Security Administration,* 2011-2012.

"Why Don't Retirees Insure Against Long-Term Care Expenses? Evidence from Survey Responses" (with Jeffrey Brown and Gopi Shah Goda), *Social Security Administration,* 2010-2011.

"Geographic Dispersion and the Well-Being of the Elderly" (with Suzanne Bianchi and Judith Seltzer), *Social Security Administration,* 2009-2010.

"For Better or Worse: Disability Benefits and Outcomes in Later Life" (with Jonathan Skinner), *Social Security Administration,* 2008-2009.

"Out of Pocket Medical Expenses and Retirement Security" (with Jonathan Skinner), *Social Security Administration,* 2007-2008.

"Non-Pecuniary Aspects of Retirement," principal investigator, *National Instititutes of Health,* 2003-2008 (extended) R01.

"Understanding Old Age Poverty Rates of the Divorced and Never Married" (with Robert Schoeni), *Social Security Administration,* 2002-2003.

"Changes in Income, Wealth, or Medical Expenses? A New Look at the Causes of Poverty among Widows," (with Robert Schoeni), *Social Security Administration,* 2002-2003.

"Aging and Intergenerational Assistance within Families," principal investigator, *National Institutes of Health*, 1998-2006 (extended) R29.

"The Effects of Pre-Retirement Expectations on Retirement Age," *Retirement Research Foundation* (through the UCLA Center on Aging), 1993-1994.

"Labor Market Rigidities and the Retirement Behavior of the Elderly," *UCLA Center on Aging*, 1992-1993.

UCLA Academic Senate Grants, 1992-2007, 2010-2013.

Current Departmental and University Service:

Council on Planning and Budget, 2017-present, Chair 2019-present

University of California, Committee on Planning and Budget, 2019-present

UCLA Executive Board, 2019-present

Development Committee, 2019-present

American Talent Initiative Faculty Committee, 2019-present

Classroom Advisory Committee, UCLA Academic Senate, 2018-present

Director Kevin Albert Family Endowment, 2011-present

Recent Past Departmental and University Service:

Search Committee, Vice Chancellor and Chief Financial Officer, 2018

Chair, Department of Economics 2013-2017

Review Committee for the Dean of the Anderson School of Business, 2016

Review Committee for the Dean of Social Sciences, 2014

UCLA Academic Senate, Undergraduate Council, 2011-2014

Vice Chair of Undergraduate Studies, Department of Economics 2009-2013

Chair's Advisory Committee, Department of Economics 2009-2013

Personnel Committee, Department of Economics 2009-2013

Search Committee, Vice Provost and Dean for Undergraduate Education, 2012

Regents Scholarship Reading Committee, 2012

Special Assistant to the Dean of Social Sciences, 2009-2010

UCLA Academic Senate, Graduate Council

Professional Service:

National Academies of Sciences, Engineering, and Medicine, Committee on Loneliness and Isolation Among the Elderly, 2018-present

Social Security Technical Panel on Labor Force Participation, 2017

Phi Beta Kappa Visiting Scholar Committee, 2016-present

Phi Beta Kappa Awards Committee, 2018-present

Chair, Study Frame Advisory Council, The HUMAN Project, 2015-2017

Advance Placement Exam in Economics Review Committee, 2013

Chair, NIH Behavioral Science Review Committee, 2013

National Longitudinal Surveys, Technical Review Committee, 2012-present

Co-Investigator, Health and Retirement Study, 2009-present
National Health and Aging Trends Study, Scientific Advisory Panel, 2009-present
American Economic Review, Excellence in Refereeing Award, multiple years
Study Section Reviewer, National Institute of Health, 2008-2014
Panel Study of Income Dynamics, Board of Overseers, 2008-2014
Steering Committee, Health and Retirement Study, 2001-2005
International Longevity Center Program Advisory Group, 2002-2005
Chair, Economics of Aging Interest Group, Gerontological Society of America, 2001-2002
Senior Economist, White House Council of Economic Advisers, 2000-2001
Brookdale Foundation Advisory Panel

Teaching Experience:

Graduate:
- Probability and Statistics
- Labor Economics

Undergraduate:
- Microeconomic Theory
- Public Finance
- Your Tax Dollars at Work
- Understanding Federal Spending
- Managerial Decision Making

Invited Presentations and Discussions:

2019: CEPAR Economics of Aging, University of New South Wales (keynote address); RAND Summer Institute; Working Longer Workshop, Harvard University Population Center; CEPRA/NBER Workshop on Aging and Health, Lugano, Switzerland; University of Notre Dame

2018: Aging and Work, Harvard University Population Center; Minnesota Economic Association(keynote address), St. Paul, MN; NBER Working Longer Conference, Jackson Hole, WY; Max-Planck / NBER Conference on Aging and Health, Munich, Germany; National Press Foundation, Washington DC

2017: China Center for Economic Research Summer Institute (keynote address) Yantai, China; Stanford Institute for Economic Policy Research (SIEPR); CEPRA/NBER Workshop on Aging and Health, Lugano, Switzerland; Financing Longevity: The Economics of Pensions, Health, Long-term Care and Disability Insurance, Asian Pacific Research Center, Stanford University

2016: Stanford Institute for Economic Policy Research (SIEPR); Retirement Research Consortium Annual Meetings, Washington DC; NBER Women Working Longer Conference, NBER, Cambridge, MA; American Economic Association Annual Meeting, San Francisco

2015: Phi Beta Kappa Scholar (St. Benedict; University of Arkansas; California State University, Long Beach; University of Colorado, Boulder; University of Wyoming; University of New Hampshire); Lumen Christi Institute, Economics and Catholic

Social Thought Conference; Peking University; NBER Women Working Longer Conference

2014: Stanford University; Phi Beta Kappa Scholar (Hendrix College; Hiram College); Retirement Research Consortium, Washington DC; RAND Summer Institute; HRS Summer Workshop, University of Michigan; Georgia State University

2013: University of Southern California; University of Notre Dame; Barcelona, Retirement Research Consortium Annual Meeting; NBER-CCER meeting Peking University; University of Michigan HRS Summer School; Singapore Management University; National University of Singapore; Symposium on Aging, UCLA Center for Policy Research on Aging; ESRI/Japanese Cabinet Meeting, Tokyo, Japan; Hitotsubashi University, Tokyo, Japan; American Economic Association, Annual Meeting

2012: Robert Day School, Claremont McKenna College; University of Toronto; CCER, Peking University; Retirement Research Consortium, Annual Meeting, Washington DC; RAND Summer Institute, Santa Monica, CA; Health Affairs Policy Briefing, Washington DC; Legacy of the War on Poverty: Implications for the Future of Anti-Poverty Policies, Ann Arbor, MI; "Aging with Disability: Demographic, Social and Policy Considerations" Washington, DC

2011: Heidelberg University, Germany, Keynote Address; Boston College Retirement Research Center; Gerontological Society of America Annual Meeting; NBER Insurance Meeting; Harmonization of Cross-National Studies of Aging Meeting, Peking University; Health and Retirement Study Summer Workshop, Ann Arbor, MI; Michigan Retirement Research Center Annual Meeting; Texas A & M University

2010: American Economic Association Annual Meeting; University of Michigan Retirement Research Center Annual Workshop; National Academy of Sciences Workshop; Retirement Research Consortium Annual Meeting, Washington DC

2009: American Economic Association Annual Meeting; MacArthur Foundation Aging Society Network Conference, Coral Gables, FL; School of Policy, Planning and Development, University of Southern California; University of New Hampshire; NBER Aging Meeting; Families and Health, NICHD–sponsored Conference, Bethesda, MD

2008: NBER Public Finance Spring Research Meeting; Retirement Research Consortium Annual Meeting; Banbury Center, Cold Spring Harbor National Laboratory Conference in Honor of James Watson's 80th Birthday

2007: Tilburg University; International Conference for Panel Data Analysis, Seoul, South Korea; IZA Conference on Long Term Care, Bonn, Germany; Cognitive Economics Conference, University of Michigan; China Center for Economic Research/NBER Conference; American Economic Association Annual Meeting

2006: University of Pennsylvania, University of Michigan, CIE-ITAM, Dartmouth College, Pennsylvania State University symposium on "Caring and Exchange within and Across Generations"; NBER Insurance Meeting, Washington University St.

Louis; University of Pennsylvania; Population Association of America Annual Meeting

2005: Michigan Retirement Research Center Workshop; Long-term Care Network Conference, Ann Arbor, MI; Syracuse University; Cornell University; Boston College; American Economic Association Annual Meeting

2004: HRS Conference on Older Families, Santa Fe, NM; University of Kentucky; Gerontological Society of America Annual Meeting

2003: American Economic Association Annual Meeting; JCER-NBER Joint Conference, Nikko, Japan; RAND; NBER Conference on Taxation and Savings; Rutgers University; NBER Fall Health Care Meeting

2002: State University of New York, Stony Brook; The Ohio State University; Harvard/MIT Public Finance workshop; American Economic Association Annual Meeting

2001: Rutgers University; The Federal Reserve Bank of New York; International Longevity Center; University of North Carolina; Boston College Conference on Estates and Gifts; NBER Public Economic Meetings (fall); International Health Economics Association Meetings; University of Maryland

2000: National Bureau of Economic Research Summer Institute; Stanford University; Brookings Conference on Estate Taxation; NBER Conference on Welfare Programs; American Economic Association Annual Meetings

1999: Tax Policy and the Economy, annual meeting; NBER Conference on the Distributional Effects of Social Security Reform; University of Southern California, Andrus Center; Department of Economics, University of California, Berkeley; UCLA, Medical School

1998: Gerontological Society of America, National Meetings; International Seminars in Public Economics, Université de Liège, Belgium; Brookdale Foundation Annual Retreat; University of Chicago

1997: Texas A&M University; University of California, San Diego; Econometrics Society Annual Meetings; UCLA/RAND Joint Workshop on Labor and Population; NBER Economics of Aging Meeting

1996: F. Thomas Juster Retirement Conference; Annual Meeting of the Gerontological Society of America; NBER Summer Institute; Center for Pension and Retirement Research; Brookdale Foundation Annual Retreat; American Economic Association Annual Meetings

1995: Annual Meeting of the Gerontological Society of America; Health and Retirement Survey, Wave 2 Conference, University of Michigan; NBER Economics of Aging Meeting; Population Association of America Meetings; Brookdale Foundation Annual Retreat; Boston University; Boston College; Harvard/MIT Labor Economics Seminar

1994: Syracuse University; NBER Summer Institute; Asset and Health Dynamics Survey, Early Results Conference, University of Michigan; Institute for Research on Poverty Conference; Center for Pension and Retirement Research Conference

1993: University of Arizona; Health and Retirement Survey, Early Results Conference; Western Economic Association Meetings; University of California, Santa Barbara; Institute for Industrial Relations Conference