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PROFESSIONAL EXPERIENCE

Matrix Global Advisors, LLC

CEO and Founder, 2007–Present

American Enterprise Institute

Senior Fellow, 2021-Present

Resident Fellow, 2017–2021

Research Fellow, 2007-2017

Research Assistant, 1997-1999

Hooper Lundy & Bookman PC

Economic Policy Advisor, 2012-Present

Rutgers School of Management and Labor Relations

Louis O. Kelso Fellow, 2017-2018

U.S. Chamber Foundation

Fellow, 2012-2013

Committee on Ways and Means, U.S. House of Representatives

Senior Advisor to the Chairman, 2005–2007

Chief Economist, 2003-2007

Senior Economist, 2002-2003

White House Council of Economic Advisers

Staff Economist, 2001–2002

EDUCATION

Boston University, M.A. Mathematical Finance, 2001

Tufts University, B.A. Economics, 1997

BOOKS AND BOOK CHAPTERS

"A Simpler, More Responsible, and Pro-Growth Tax System," Chapter in American Renewal, AEI Press, 2022. With Kyle Pomerleau.

<u>Carbon Tax Policy: A Conservative Dialogue on Pro-Growth Opportunities</u>, Alliance for Market Solutions, 2017. Editor.

The Real Tax Burden: More Than Dollars and Cents, AEI Press, 2011. With Alan D. Viard.

ARTICLES AND STUDIES

- "Implications of Cannabis Legalization for the US Federal Budget." (with Brian J. Miller and Stan Veuger) *Public Budgeting and Finance*, April 12, 2024.
- "Otsuka's Economic and Health Impact in the United States 2023-2024." MGA Study, March 8, 2024.
- "Rebates and Drug Price Increases: An Analysis." MGA Study, January 10, 2024.
- "Regulatory Uncertainty: General Economic Principles and the Case of Employee Stock Ownership Plans." MGA Study, October 2023.
- "Understanding the Role of PBMs in the US Drug Pricing Debate." MGA Study, September 2023.
- "The Promise of Digital Health for Home Dialysis Patients." (with Christy Robinson and Eric Wallace, MD) *MGA Study*, May 2023.
- "Economic Impact of Community Health Centers in the United States." MGA Study, March 2023.
- "The Overlooked Decline in Community Health Center Funding." MGA Study, March 2023.
- "Near-Term Expectations for Adalimumab Biosimilars in the United States." (with Christy Robinson) *MGA Study*, February 2023.
- "Patent Thickets and Lost Drug Savings." (with Christy Robinson) MGA Study, January 2023.
- "Improvements in Medical Benefit Coverage of Biosimilars." (with Christy Robinson) MGA Study, December 2022.
- "Biosimilar Market Opportunities in Ophthalmology." MGA Study, July 2022.
- "Otsuka's Economic and Health Impact in the United States." MGA Study, May 2022.
- "<u>Understanding Drug Rebates and Their Role in Promoting Competition</u>." *MGA Study*, March 2022.
- "Teva Global Economic Impact Report." MGA Study, July 2021.
- "How Patent Thickets Constrain the US Biosimilars Market and Domestic Manufacturing." (with Christy Robinson) MGA Study, May 2021.
- "The Tax Benefits of Parenthood: A History and Analysis of Current Proposals." (with Kyle Pomerleau and Grant M. Seiter) *American Enterprise Institute*, February 2021.
- "Potential Savings from Accelerating US Approval of Complex Generics." MGA Study, February 2021.
- "Potential Savings from Interchangeable Biosimilars in the Pharmacy Benefit." MGA Study, November 2020.
- "The Cost of Brand Drug Product Hopping." MGA Study, September 2020.
- "Negative Economic Impact of Restricting Drug Rebates in Medicare Part D." MGA Study, September 2020.

- "The Negative Economic Effects of Medicare Buy-In and Public Option Proposals." MGA Study, August 2020.
- "The Economic Cost and Spatial Diffusion of the Opioid Crisis, 2009–18." (with Scott Ganz and Burke O'Brien) *AEI Economic Perspectives*, June 29, 2020.
- "Progressivity, Redistribution, and Inequality." (with Scott Ganz) National Affairs, June 23, 2020.
- "Lessons for the United States from Europe's Biosimilar Experience." MGA Study, June 2020.
- "Shared Savings Demonstration for Biosimilars in Medicare: An Opportunity to Promote Biologic Drug Competition." MGA Study, May 2020.
- "Teva Global Economic Impact Report." MGA Study, January 2020.
- "The Unintended Economics of the BLOCKING Act." MGA Study, January 2020.
- "Biosimilar Savings Opportunities in the Medical Benefit: A Large-Employer Case Study." *MGA Study*, August 2019.
- "Gamesmanship and Other Barriers to Drug Competition." MGA Study, July 2019.
- "A Balanced Plan for Fiscal Stability and Economic Growth." (with Joseph Antos, Andrew G. Biggs, James Capretta, and Alan D. Viard) *Solutions Initiative by Peter G. Peterson Foundation*, June 11, 2019.
- "Concerns Regarding the Proposed Rule to Restrict Drug Manufacturer Rebates in Medicare Part D and Medicaid MCOs." MGA Study, April 2019.
- "State Opioid Taxes: Economic and Health Policy Implications." MGA Study, January 2019.
- "Steps to Reducing Barriers to Biosimilars in the United States." (with Christy Robinson) MGA Study, September 2018.
- "<u>Unrealized Savings from the Misuse of REMS and Non-REMS Barriers</u>." *MGA Study*, September 2018.
- "The Crisis Facing Multiemployer Pension Plans." MGA Study, August 2018.
- "Charitable Giving and the Tax Cuts and Jobs Act." (with Derrick Choe) AEI Economic Perspectives, June 18, 2018.
- "The Geographic Variation in the Cost of the Opioid Crisis." (with Scott Ganz) AEI Economics Working Paper Series, March 20, 2018.
- "The Political Economy of a Carbon Tax: A County-By-County Investigation." (with Scott Ganz) AEI Economics Working Paper Series, February 1, 2018.
- "The Bleak Long-Run Outlook: US Fiscal Policy and How to Improve It." The Macdonald-Laurier Institute, November 30, 2017.
- "The Case for Fiscal Reform: Lessons from the Anglosphere." (with Sean Speer) *The Macdonald-Laurier Institute*, November 29, 2017.
- "REMS and Restricted Distribution Programs." MGA Study, June 2017.

- "How the Next FDA Commissioner Can Address Drug Prices by Promoting Drug Competition." *MGA Study*, April 2017.
- "Employee Stock Ownership Plans as an Exit Strategy for Private Business Owners." MGA Study, March 2017.
- "Causes and Non-Causes of Drug Shortages." MGA Study, January 2017.
- "<u>Tax Reform: Ryan-Brady Plan is a Better Way</u>." *AEI Economic Perspectives*, October 31, 2016.
- "Estimated Cost of FDA's Proposed Generic Drug Labeling Rule: Updated for 2017–2024." MGA Study, July 2016.
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- "Understanding Middle-Class Tax Cuts." AEI Economic Perspectives, April 2016.
- "Economic Benefits of Increased Home Dialysis Utilization and Innovation." MGA Study, March 2016.
- "<u>Understanding the True Causes of the U.S. Methamphetamine Problem</u>." *MGA Study*, November 2015.
- "Medicaid Provider Taxes: Closing a Loophole." *Tax Notes*, June 29, 2015.
- "Observable Flaws in CMS's Dialysis Star-Rating System and a Proposed Alternative." Bloomberg BNA's Medicare Report, May 1, 2015.
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- "American Association for Justice Misses on 'The True Costs of Generic Drug Regulation." *MGA Study*, April 2015.
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- "The Economic Viability of a U.S. Biosimilars Industry." MGA Study, February 2015.
- "Considerations of the FDA's Impact on Competition in the Drug Industry." MGA Study, November 2014.
- "Obesity in the Medicare Population: Opportunities for Cost Savings." MGA Study, October 2014.
- "Strengthening the G20's Membership." (with James K. Glassman) National Taxpayers Union White Paper, September 22, 2014.
- "Health and Economic Benefits of Weight Loss among Obese U.S. Adults." MGA Study, August 2014.
- "Lost Prescription Drug Savings from Use of REMS Programs to Delay Generic Market Entry." MGA Study, July 2014.
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- "Proposed FDA Generic Drug Regulation: Higher Prices, No Public Health Benefit." (with Scott Gottlieb, M.D., and Robert W. Pollock) AEI Health Policy Outlook, March 2014.
- "Comparing Economic Impact Estimates of 'Reverse Payment' Settlements." MGA Study, February 20, 2014.
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- "American Households: An Inspiration for Political Change." Business Horizon Quarterly, Summer 2013.
- "Israeli Corporate Tax Policy: A Pro-Growth System at Risk." AEI Economic Perspective, June 2013.
- "Sequestration's Uniform Medicare Cut Will Yield Disparate Impacts Across Providers." (with Brett Leitner) *The Health Lawyer*, June 2013.
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- "The Long-Term Returns of Obesity Prevention Policies." MGA Study, April 24, 2013.
- "Macroeconomic Impact of S ESOPs on the U.S. Economy." MGA Study, April 17, 2013.
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- "Consequences of Inaction: The Fiscal Cliff and the Looming Entitlement Crisis." *National Chamber Foundation White Paper*, December 13, 2012.
- "A Debt Strategy for the Next 30 Years." Business Horizon Quarterly, Fall 2012.
- "Returning to an Economic Growth Agenda." in FOCUS Quarterly, Fall 2012.
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- "Corporate Tax Rates: Receipts and Distortions." Tax Notes, December 22, 2008.
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- "Effective Marginal Tax Rates, Part 2: Reality." (with Alan D. Viard) *Tax Notes*, September 20, 2008.
- "Effective Marginal Tax Rates, Part 1: Basic Principles." (with Alan D. Viard) *Tax Notes*, September 8, 2008.
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- "Taxing Capital." AEI Tax Policy Outlook, February 2008.
- "Individual Taxes After 2010: Post-Permanence-ism." National Tax Journal, September 2007, Vol. LX, No. 3.
- "Forecasting U.S. Health Care Spending: A Review of Federal Estimates." *AEI Working Paper*, August 2007.
- "Taxing Capital: How Much You Pay Matters, But So Does How You Pay." (with Bill Thomas and Robert S. Winters) *Buchanan, Ingersoll & Rooney Tax Advisory*, May 30, 2007. Reprinted in *Practical US/Domestic Tax Strategies*, July 2007.
- "Revenue-Maximizing Corporate Income Taxes: The Laffer Curve in OECD Countries." (with Kevin Hassett) *American Enterprise Institute Working Paper #137*, July 31, 2007.
- "Knowing What's Good for You: Energy Conservation Investment and the Uninformed Consumer Hypothesis," (with Gilbert Metcalf and Kevin Hassett) *Tufts University Working Paper*, June 1999.

TESTIMONY

- "Broad, Efficient, and Technology-Neutral Tax Policy for Clean Energy." Testimony before Senate Committee on Finance, April 27, 2021.
- "Foster Competition to Realize Additional Pharmaceutical Cost Savings." Statement before the Senate Committee on Health, Education, Labor, and Pensions Subcommittee on Primary Health and Retirement Security: "Why Does the US Pay the Highest Prices in the World for Prescription Drugs?" March 23, 2021
- "Efficient and Targeted Tax Policy During the Coronavirus Pandemic." Testimony before House Subcommittee on Select Revenue Measures, September 11, 2020.
- "<u>Understanding Competition in U.S. Prescription Drug Markets: Entry and Supply Chain</u>
 Dynamics." *Public Comment Submitted to the Federal Trade Commission*, December 8, 2017.
- "The Opportunities for Individual Tax Reform." Testimony before Senate Committee on Finance, September 14, 2017.
- "The Hatch-Waxman Amendments: Ensuring a Balance Between Innovation and Access." Remarks at Food and Drug Administration Public Meeting, July 18, 2017.
- "S is for Savings: Pro-Growth Benefits of Employee-Owned S Corporations." Testimony before House Small Business Committee, April 27, 2016.
- "Supplemental Applications Proposing Labeling Changes for Approved Drugs and Biological Products." *Remarks at Food and Drug Administration Public Meeting*, March 27, 2015.
- "Framework for Evaluating Tax Extenders." Testimony before House Subcommittee on Select Revenue Measures, June 8, 2012.
- "Tales from the Unemployment Line: Barriers Facing the Long-Term Unemployed." Statement Submitted for the Record, Senate Committee on Health, Education, Labor and Pensions, December 21, 2011.
- "Social Security's Finances." Testimony before House Subcommittee on Social Security, June 23, 2011.
- "The State of U.S. Manufacturing." Testimony before Joint Economic Committee, June 22, 2011.
- "Retirement Security: Challenges Confronting Pension Plan Sponsors, Workers, and Retirees." Testimony before House Subcommittee on Health, Employment, Labor, and Pensions, June 14, 2011.
- "<u>An Incremental Approach to Social Security Reform</u>." *Testimony before Senate Finance Committee*, May 10, 2011.
- "Saving on Multi-Source Drugs in Ohio's Medicaid Program." Testimony before Ohio House Health and Human Services Subcommittee, April 7, 2011.
- "The Stimulus: Two Years Later." Testimony before House Subcommittee on Regulatory Affairs, Stimulus Oversight and Government Spending, February 16, 2011.
- "Factors Affecting Unemployment Insurance Trust Fund Solvency." Testimony before House Ways and Means Committee, Subcommittee on Income Security and Family Support, May 6, 2010.

- "<u>Testimony on Creating a Pathway for Follow-on Biologics</u>." *Testimony before House Judiciary Committee*, July 14, 2009.
- "Follow-On Biologic Drugs: Framework for Competition and Continued Innovation." *Remarks at Federal Trade Commission Roundtable*, November 21, 2008.
- "Unemployment Insurance: Considerations for Extending Benefits." Testimony before House Ways and Means Committee, Subcommittee on Income Security and Family Support, April 10, 2008.

AMICUS BRIEFS AND PUBLIC COMMENTS

- "Amicus Brief in Moore v. United States." (with Kyle Pomerleau, Michael R. Strain, Stan Veuger and Alan Viard) *Amicus Brief Filed with Supreme Court*, October 24, 2023.
- "A Letter to the FTC Regarding the Business Practices of Pharmacy Benefit Managers and Their Impact on Independent Pharmacies and Consumers." Public Comment Submitted to the Federal Trade Commission, May 12, 2022.
- "Brief of Brill, Knoll, Mason, and Viard as Amici Curiae in Support of Petitioner in South Dakota v. Wayfair, Inc." (with Alan D. Viard, Michael Knoll, and Ruth Mason) U.S. Supreme Court, March 6, 2018.
- "RE: Docket No. R-1404 and RIN No. 7100 AD63." Comment to the Federal Reserve on Debit Card Interchange Fees, February 22, 2011.
- "A Letter to the FDA Regarding iQOS, a Less Harmful Alternative to Cigarettes." (with Sally Satel) *Public Comment Submitted to the Food and Drug Administration*, November 7, 2017.
- "E-Cigarettes: The Risk of Over-Warning." Public Comment Submitted to the Food and Drug Administration, September 30, 2015.
- "Brief of the Tax Economists as Amici Curiae in Maryland Comptroller v. Wynne." (with Christopher DeMuth, Kevin A. Hassett, Alan D. Viard, Alan J. Auerbach, Robert Shapiro, R. Glenn Hubbard, and Brian Galle) U.S. Supreme Court, September 29, 2014.
- "Comment," Emerging Health Care Competition and Consumer Issues. Federal Trade Commission Roundtable, Project No. P08390, December 22, 2008.
- "Supreme Court Amicus Brief in *Davis v. Kentucky Department of Revenue*." (with Alan D. Viard, Christopher DeMuth, Kevin Hassett, Glenn Hubbard, Kent Smetters, and Jason Furman) U.S. Supreme Court, September 21, 2007.

OP-EDS AND OTHER COMMENTARY

- "Patent Thicket Déjà Vu." (with Christy Robinson) MGA Commentary, May 23, 2024.
- "Will Congress Finally Act on Patent Thickets?." (with Christy Robinson) MGA Commentary, May 20, 2024.
- "Navigating the Upcoming Tax Cliff: Can Republicans Prevent a Tax Increase Without Adding to the Deficit?" *The Ripon Forum*, April 25, 2024.

- "Current and Future State of US Biosimilars." (with Christy Robinson) MGA Commentary, April 24, 2024.
- "Trends in the US Insulin Market: New Prices, New Players, New Dynamics." MGA Commentary, April 23, 2024.
- "Biden Budget Proposes a Step Toward Biologic Drug Competition." MGA Commentary, March 26, 2024.
- "The Next Tax Fight: SALT." AEIdeas, February 13, 2024.
- "The Threat to Preferred Pharmacy Networks." MGA Commentary, January 8, 2024.
- "Patent Thicket Remedies." (with Christy Robinson) MGA Commentary, December 7, 2023.
- "This Corporate Law Case Could Accidentally Overturn U.S. Taxes." (with Stan Veuger and Kyle Pomerleau) *Foreign Policy*, December 4, 2023.
- "The Economics of "Delinking" PBM Compensation." MGA Commentary, November 2, 2023.
- "Don't Mix US Tax Administration Policy with the Israel-Hamas Conflict." AEIdeas, November 2, 2023.
- "The Supreme Court Should Leave the Tax Code Alone." (with Kyle Pomerleau, Michael R. Strain, Stan Veuger and Alan D. Viard) *AEIdeas*, October 24, 2023.
- "Unintended Consequences of Limiting PBMs." MGA Commentary, September 26, 2023.
- "Taking Stock of the Humira Biosimilars Market." (with Christy Robinson) MGA Commentary, June 26, 2023.
- "Analyzing the Build It in America Act: Proposals for Business Tax Reform." (with Kyle Pomerleau) *AEIdeas*, June 12, 2023.
- "Flawed Approach: The Working Families Tax Cut Act as a Response to Inflation." (with Kyle Pomerleau and Grant Seiter) *AEIdeas*, June 8, 2023.
- "PBM Concerns Induce Surprising Bipartisanship." MGA Commentary, May 31, 2023.
- "A Drug with Two Prices." MGA Commentary, April 27, 2023.
- "Health Care Workforce Shortages: An Updated Look." (with Grant Seiter) AEIdeas, February 21, 2023.
- "Narrow House GOP Victory Should Point Toward Policy Development Agenda." AEIdeas, December 6, 2022.
- "Don't Let Pandemic Fatigue Inhibit Pandemic Preparedness." AEIdeas, November 15, 2022.
- "Macroeconomics of the Child Tax Credit." AEIdeas, November 10, 2022.
- "More Concerns with the Massachusetts Millionaire's Tax." AEIdeas, October 11, 2022.
- "President Biden's Student Loan Forgiveness: The Impact on Individuals' State Taxes." (with Grant Seiter) *AEIdeas*, September 28, 2022.
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- "Health Care Jobs Gap Remains Serious." (with Grant Seiter) AEIdeas, July 11, 2022.
- "Massachusetts' Proposed 'Millionaires' Tax' Will Push up the Federal Deficit." (with Grant Seiter) *The Hill*, April 18, 2022.
- "Sleight of Hand: The Administration's Tax Agenda." AEIdeas, March 30, 2022.
- "Charitable Giving is Good. Be Smart About How to Encourage It." (with Grant Seiter) *AEIdeas*, March 23, 2022.
- "Pension Smoothing—The Budget Gimmick That Will Not Die." (with Alan D. Viard) *AEIdeas*, September 22, 2021.
- "Should the US Offer Tax Credits to Promote Renewable Energy?" Wall Street Journal, July 12, 2021.
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- "How Will the American Rescue Plan Impact Your 2021 Tax Liability?" (With Kyle Pomerleau and Grant Seiter) *AEIdeas*, March 17, 2021.
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- "Pick Your Child Tax Credit." AEIdeas, March 2, 2021.
- "Almost-Speaker McCarthy." AEIdeas, November 23, 2020.
- "Impact of the Coronavirus Pandemic on Red, Blue, and Swing States." (with Grant Seiter) *AEIdeas*, October 20, 2020.
- "A Deal for Coronavirus Fiscal Relief." (with Betsey Stevenson) The Hill, September 17, 2020.
- "COVID-19 and Nursing Homes: National Updates and Early Evidence on the Second Wave." (with Benedic Ippolito) *AEIdeas*, August 10, 2020.
- "Toward a Better Employee Retention Tax Credit." AEIdeas, August 3, 2020.
- "A Tax Incentive, not a Spending Program, to Boost Employment." AEIdeas, July 16, 2020.
- "The Evolving Opioid Crisis." (with Scott Ganz and Burke O'Brien) AEIdeas, June 29, 2020.
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- "Pro-Family Tax Policy: The Case of the Tax Cuts and Jobs Act." AEIdeas, October 7, 2019.
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- "SALT Repeal: Illustrated." AEIdeas, October 5, 2017.
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- "Let's Scrap Regulations in Favor of a Carbon Tax." CNBC, June 6, 2017.
- "Don't Thwart an Ally in the War on Tobacco." EURACTIV, May 12, 2017.
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- "Investing in Tax Reform Today Will Yield a Strong Economy Tomorrow." The Hill, April 11, 2017.
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- "Repeal and Replace May Have Failed Anyway." AEIdeas, March 31, 2017.
- "Border Adjustment Tax: \$260 Billion More Than You Thought." AEIdeas, January 30, 2017.

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- "Hospital (Un)productivity." Modern Healthcare, December 10, 2015.
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- "The Dangers of FDA Warnings." Morning Consult, October 22, 2015.
- "How Obamacare Overpays for Medicaid." RealClearMarkets, July 15, 2015.
- "Well Played, Pelosi." AEI, June 15, 2015.
- "Tax Day Is Not the Reason the Tax Code Stinks," American.com, April 15, 2015.
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OTHER ACCOMPLISHMENTS

Co-Chair, Washington Next Generation Board, United States Holocaust Memorial Museum, 2021–present.

Term Member, Council on Foreign Relations, 2007–2012.

Advisor (tax policy), President's Fiscal Commission, 2010.

Staff Advisor, Economy Subcommittee of the Republican Platform Committee, 2008.

Program Chair, Tax Economists Forum, 2005–2006; Program Co-Chair, 2008.

Profiled by Almanac of the Unelected, 2003, 2004, 2005, and 2006.

Young Leader, American Council on Germany, 2005.

Recipient of the Birger Lecture Award, Tufts University, 2004.

National Journal, "Key Congressional aide," 2003.

National Science Foundation Graduate Fellowship Honorable Mention, 1999 and 2000.