

MARCELO ORTIZ M.

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PERSONAL INFORMATION

Date and place of birth: January 12th, 1988, Chile.

Citizenship: Chilean and Spanish.

RESEARCH INTERESTS

Financial Accounting, Corporate Governance, Business Family, Regulation.

CURRENT EMPLOYMENT

Universitat Pompeu Fabra *Sept 2019 - Present*
Assistant Professor of Financial Accounting

Barcelona School of Economics *Sept 2019 - Present*
Affiliated Professor

UPF-Barcelona School of Management *Sept 2022 - Present*
Affiliated Professor

PUBLICATIONS

1. **More than Money: Political Participation by Elite Business Families** Joint with P. Duran and M. Carney. *Entrepreneurship Theory and Practice*. Accepted.
2. **Mandatory Financial Disclosure and the M&A Activity**. Joint with F. Urzúa, C. Peter, and P. Volpin. *The Review of Financial Studies*. 2023.
3. **Inheritance Law**. *Encyclopedia of Family Business*. Cheltenham, UK, Edward Elgar Publishing. Forthcoming.
4. **Inheritance tax, Shareholder Protection, and the market value of Family Firms**. Joint with M. Braun, M. Carney, P. Duran, and J. Riutort. *Global Strategy Journal*. 2021.
5. **When More Is Better: Multifamily Firms and Firm Performance** Joint with P. Duran. *Entrepreneurship Theory and Practice*. 2020.

WORKING PAPERS

1. **Industry Mandatory Reporting and Internal Financing: Evidence from Cash Policy**. Joint with F. Urzua. *R&R at the European Accounting Review*.
2. **Private Firms and Offshore Finance**. Joint with J. Imbet.

PRESENTATIONS

- 2024** Paris Dauphine - PSL; EAA Annual Congress; AAA Annual Conference; IESE Tax Conference.
- 2023** FARS Midyear Meeting; AIB Latin America Chapter; EAA Annual Congress; The Finance Symposium (Greece); Spanish Accounting Review II Research Meeting.
- 2022** FINCO - Universidad de Chile; BSE Summer Forum Entrepreneurship (discussant).
- 2021** AAA Annual Meeting (presenter and discussant); Corporate Finance Day, Erasmus University; EAA Virtual Congress (presenter and discussant).
- 2020** FMA Virtual Meeting (presenter and discussant); UPF-ESADE Internal Accounting Seminar.
- 2019** FMA European Conference; Universitat Pompeu Fabra; IESEG; Erasmus School of Economics; Family Enterprise Research Conference (FERC).
- 2018** EAA Talent Workshop; WHU Accounting Brownbag Seminar; Erasmus Finance Day; AIB Latin America Chapter.
- 2017** Annual Meeting of the Chilean Society of Economists.

PROFESSIONAL SERVICE

Co-organizer	Barcelona Accounting Seminars and Workshops (2020-Present)
Scientific Committee	EAA Annual Congress (2024) The Finance Symposium (2023)
Membership	American Accounting Association Accounting and Economics Society European Accounting Association

TEACHING EXPERIENCE

Instructor

- Financial Statement Analysis, Master in Management, UPF-Barcelona School of Management *Fall 2022, 2023*
- Business Economics, Bachelor, Universitat Pompeu Fabra *Fall 2020, 2023*
- Introduction to Financial Accounting, Bachelor, Universitat Pompeu Fabra *Spring 2019-2023*

EDUCATION

Universidad Adolfo Ibáñez - Chile <i>Ph.D. in Finance</i> Advisor: Matias Braun	<i>2015-2018</i>
Erasmus University, Rotterdam School of Management <i>Visiting Ph.D. student in Finance.</i> Sponsor: Francisco Urzúa	<i>Jan-Jun 2018</i>
Universidad Adolfo Ibáñez - Chile <i>M.Sc. in Financial Engineering</i> <i>B.Sc. in Industrial Engineering</i>	<i>2006-2012</i>

INDUSTRY EXPERIENCE

Itau Bank (formerly Corpbanca) - Chile <i>Portfolio manager:</i> interest and liquidity risk management, debt issuance, asset securitization, and derivatives trading.	<i>2012-2015</i>
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SKILLS

Languages:	Spanish (Native), English (Fluent), and Catalan (Basic).
Programming:	Python, Julia, C++, Stata, and Matlab.
Other:	L ^A T _E X, SQL, Git, and GNU Linux.