

Poojan Patel

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EDUCATION

University of Massachusetts - Boston

Expected May 2026

Ph.D. in Business Administration - Finance Track

Stevens Institute of Technology

2021 - 2022

M.S. in Financial Engineering

SVKM's NMIMS University

2016 - 2021

MBA in Technology Management

Bachelors of Technology in Computer Engineering

TEACHING EXPERIENCE

Bryant University

- **Visiting Assistant Professor of Finance**

- FIN 201 - Financial Management (2 Sections, Fall 2025)

- FIN 466 - Data Analysis for Finance (Fall 2025)

University of Massachusetts at Boston

- **Principal Instructor - Course Evaluation (4.5/5)**

- MBA AF 632 - Asset Management Practicum (Spring 2025)

RESEARCH

Research Interest

Gen AI, Corporate Disclosures, Climate Transition Risk, Media & Finance

Publications

- **Assessing the Relevance of Sell-Side Analyst Recommendations**

Co-authors: Ekene S. Aguegbah, Uchenna C. Onuoha, Poojan Patel

Journal : Review of Financial Economics (Forthcoming)

Books

- **Prompt Engineering for Accounting and Finance**

Co-authors: Sunil Kumar, Atreya Chakraborty, Poojan Patel

Publisher : Palgrave Macmillan. (Forthcoming, December 2025).

Under-Review Manuscript

- **The Price of News Desert: The Impact of Newspaper Closures on Financial Service Quality**

Working Papers

- **Climate Regulation Risk Exposure and the Innovation Response of Firms**
- **When Words Don't Match Deeds: The Cost of AI Washing in Corporate Lending**
- **Navigating the Storm: Evaluating Company's Expected Exposures and Disclosure to Climate Regulation using Generative AI and its impact on ICOE**
- **Bridging Disciplines: Leveraging AI for Cross-Disciplinary Research in Graduate Education**

SERVICE TO THE PROFESSION

- **Manuscript Reviewer & Program Committee**
 - The Eastern Finance Association- Annual Meeting (2026)
 - The Journal of Entrepreneurial Finance, FMA Annual Meeting (2025), SFA Annual Meeting (2025), FMA Applied Finance Conference (2025),
 - 3rd International Conference on CSR (2023)
- **Guest Lecturer- Center for Collaborative Leadership at UMass Boston(2025)**
 - Lecture on AI and cross-functional collaboration in organizations to mid-level managers, highlighting strategies for leveraging generative AI to bridge knowledge silos and enhance team decision-making.
- **Conference Organizing Committee Member**
 - Organising Committee of Third Conference on CSR organized by UMass Boston and EM Normandie (2023). Theme: Measurement and Impact of ESG as a business strategy driver
- **Discussant**
 - MRS International Risk Conference (2025) Global Finance Conference (2025), Gen AI Conference by Journal of Banking and Finance(2024), Brown Bag Seminar at UMass Boston(2025,2024)
- **Bloomberg Bootcamp Instructor**
 - Chelsea High School Students at UMass Boston (2024), ESG-focused Bloomberg Bootcamp for Graduate Students(2024), UMass Boston Undergraduate Student Managed Fund

LEADERSHIP & EXTRACURRICULAR ACTIVITIES

- **Portfolio Manager of UMass Boston Graduate Student Managed Fund**
 - Leading and Managing Graduate Student Managed Fund at UMass Boston with a portfolio size of \$270K
- **President and Founder, UMB Investment Club**
University of Massachusetts Boston (January 2023 – Present)

- Led club initiatives to enhance financial literacy and investment knowledge among students, organized workshops and speaker events featuring finance professionals and managed investment simulations and hands-on trading activities for members.

- **Chairperson, IEEE NMIMS**

Narsee Monjee Institute of Management Studies (July 2019 – August 2020)

AWARDS & RECOGNITIONS

- **Runner-up, Student Managed Fund Competition**

UMass Foundation (2026), UMass Foundation (2025)

- **Ph.D. Academic Excellence in Finance**

University of Massachusetts Boston (2024)

- **Student Spotlight**

College of Management, University of Massachusetts Boston (2023)

- **Dean's Scholarship**

University of Massachusetts Boston (2022 – 2026)

- **Student Ambassador**

Mukesh Patel School of Technology Management & Engineering, NMIMS University (2021)

PROFESSIONAL MEMBERSHIPS

AFA American Finance Association

AOM

Academy of Management

FMA Financial Management Association

TRI ALPHA

First Gen Honors Society

EFA Eastern Financial Association

ABSTRACTS

Working Projects & Thesis Chapter

- **Climate Regulation Exposure and the Innovation Response of Firms**

This paper examines how firms respond to climate regulation through environmental innovation. Using a novel text-based measure of regulatory exposure constructed from SEC and EPA texts, we find that firms facing greater climate policy exposure generate more valuable and higher-quality environmental innovations. The results suggest that regulation functions as both a constraint and a catalyst for technological change.

- **When Words Don't Match Deeds: The Cost of AI Washing in Corporate Lending**

This paper explores the phenomenon of AI washing, where firms emphasize AI adoption rhetorically without substantive implementation or integration into their operations. It examines the motivations behind this practice, its implications for stakeholders, and the resulting challenges in evaluating genuine technological advancement. Leveraging generative AI and Natural Language Processing, the study provides an innovative approach to identifying and analyzing AI washing, offering insights into distinguishing superficial claims from authentic AI adoption.

- **Navigating the Storm: Evaluating Company's Expected Exposures and Disclosure to Climate Regulation using Generative AI**

This research introduces a novel measure to assess climate regulatory risk by leveraging firm business description summaries and analyzing the impact of new regulations passed by the EPA on firm operations. Using large language models (LLMs), the study identifies regulatory exposure and interprets

its implications for businesses, offering a cutting-edge approach to understanding the intersection of environmental policy and corporate risk management.

Presented at: Generative AI Conference by Journal of Banking and Finance*, MRS International Risk Conference (2025)*, Global Finance Conference* (2025)

- **The Price of News Desert: The Impact of Newspaper Closures on Financial Service Quality**

This study examines the effect of local newspaper closures on the quality of financial services. We explore how the loss of local journalism impacts transparency, accountability, and information flow in financial markets. The findings reveal a significant decrease in financial service quality following newspaper closures, highlighting the critical role of local media in maintaining the quality of financial services and consumer trust.

Presented at: Global Finance Conference (2025)*

- **Bridging Disciplines: Leveraging AI for Cross-Disciplinary Research in Graduate Education**

This study explores how AI, particularly generative AI, can facilitate cross-disciplinary research among graduate students. It examines AI's role in breaking knowledge silos, enabling interdisciplinary collaboration, and enhancing research efficiency. By analyzing case studies of AI-assisted research across fields, the paper provides insights into how graduate students can effectively utilize AI tools to bridge gaps between disciplines, foster innovation, and accelerate knowledge integration.

REFERENCES

Lucia Silva Gao

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Maureen A. Scully

Penney Chair in Leadership

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