

**JOSEPH B. MATHESON,
MBA, CPA, ABV, CVA, DABFA, FACFEI, PFS, CFF, CFE**

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CURRICULUM VITAE

ACADEMIC INFORMATION:

MBA, Seton Hall University, South Orange, NJ, 1990
International Business Certificate, GPA: 3.8

BA, Rutgers University, New Brunswick, NJ, 1984
Majors: Economics/Finance, Minor: Statistics, GPA: 4.0 Salutatorian
Class Rank: 2 of 1500, No. 1 Economics Student

OTHER ACCOMPLISHMENTS AND ASSOCIATIONS:

ABV – Accredited in Business Valuation – AICPA
CVA – Certified Valuation Analyst
DABFA – Diplomate, American Board of Forensic Accounting
FACFEI – Fellow American College of Forensic Examiners
CITP – Certified Information Technology Professional Designation – AICPA (Formerly)
PFS – Personal Financial Specialist Designation – AICPA
CFF – Certified in Financial Forensics – AICPA
CFE – Certified Forensic Examiner
National Honors, November 1984 CPA Exam – **Elijah Watt Sells Award**
(Top 100 scores in the USA)
State Honors, November 1984 CPA Exam – **J. H. Cohn Award Nominee**
(Top 5 scores in New Jersey)
Passed and previously held a Securities License (Series & 63) and Registered
Investment Advisor credential (Series 65). Also held Life and Health Insurance License.
Member in good standing: American Institute of Certified Public Accountants
Member in good standing: New Jersey State Society of Certified Public Accountants
Association of Certified Fraud Examiners
American Board of Forensic Accountants
Member Beta Gamma Sigma – National Honor Society for Graduate Students
Member Omicron Delta Epsilon – National Honor Society for Economics
L'hommedue - Page Scholarship for Academic Excellence
Salutatorian, Class Rank: 2 of 1500, Rutgers University, May 1984

PUBLICATIONS AND SPEAKING ENGAGEMENTS:

Guest speaker on “Taking Care of Business” on WRNJ
Taught tax classes accredited for CPE to accountants
Inter-office speaking engagements to other Deloitte & Touche members
Published internal technical tax memoranda
Presented new tax law changes to the Morris County Chamber of Commerce
Published in the Morris County Magazine “Mergers & Acquisitions: The Unromantic
Side of Getting Married”

PROFESSIONAL EXPERIENCE:

Court Appearances & Acceptances as an Expert

Mr. Matheson has qualified and testified as an expert witness in New Jersey State and Federal Courts on various matters.

New Jersey – Counties: Morris, Union, Bergen, Essex, Somerset, Middlesex

Litigation Experience

Litigation support involving the preparation of wage and economic loss reports, business interruption loss reports, divorce (lifestyle analysis, tax-effected balance sheet preparation, alimony and child support analysis). Valuation of closely held businesses, stock options and restricted stock for capital gain, gift tax and compensation purposes. Valuation of businesses for partner and shareholder disputes, contract disputes, marital disputes. Investigative accounting and fraud analysis. Assistance with strategy formulation, research, and negotiations. Deposition and court testimony. Negotiations for merger and acquisition purposes. Provide analysis to mediation attorneys to assist in settlement.

Specific Industry Experience

Consulting, internet based businesses, computer consulting, affinity marketing companies, legal practices, manufacturing, food production and brokering, electrical contractors, printing, consumer products, farming, private schools, pharmaceutical companies, medical practices, plumbing and heating, contractors, daycare centers, personal services, financial services, food and drink establishments, marketing services, advertising agencies, educational services, jewelers, architectural firms, engineering firms, dental practices, hair salons, real-estate, and cleaning services.

Accounting & Taxation

More than sixteen years of public and private accounting experience with international and local companies including Deloitte & Touche and AT&T. Experience includes audit, taxation, accounting for individuals, businesses and non-profit organizations with sales ranging from 35 billion to \$100,000. Built and managed public accounting practice since 1994.

Technology

Designed and built a complete customer database and financial reporting system for Internet start-up company ultimately purchased by Pearson of England. Experience included complete system and network design, data architecture and hardware needs. Data gathered from various web and non-web sources edited, processed, promotions and fulfillment calculated, and imported into web-site reporting system for customer reporting and stored in an Access database for program evaluation reporting. Data then imported into accounting system for financial reporting. Successful migration to new accounting system. Complete responsibility for data quality control, accounts payable and accounts receivable, disbursing and receiving checks and bank reconciliation, system and accounting procedures.