

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

***Matheson & Associates, LLC***  
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***Whippany, NJ 07981***

***Tel 973-428-8885***  
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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  
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)  
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”

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## **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 valuation of businesses for partner and shareholder disputes, contract disputes, marital disputes. Valuation of closely held businesses, stock options and restricted stock for capital gain, gift tax and compensation purposes. Prepared wage and economic loss reports, business interruption loss reports, divorce (lifestyle analysis, tax-affected balance sheet preparation, alimony and child support analysis). Investigative accounting and fraud analysis. Assistance with case 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.

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