

**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  
PFS – Personal Financial Specialist Designation – AICPA  
CFF – Certified in Financial Forensics – AICPA  
CFE – Certified Fraud 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**

Joseph B. Matheson has qualified and testified as an expert witness in New Jersey State and Federal Courts on various matter. He has provided deposition and court testimony to courts in the following **New Jersey Counties: Morris, Union, Bergen, Essex, Somerset, and Middlesex**

### **Litigation Experience**

Mr. Matheson is renowned for litigation support involving the valuation of businesses for partner and shareholder disputes, contract disputes and marital dispute valuation work. As a Certified Fraud Examiner, he provides valuation of closely held businesses, stock options and restricted stock for capital gain, gift tax and compensation purposes. In addition, he calculates wage and economic loss reports, business interruption loss reports, divorce (lifestyle analysis, tax effected balance sheet preparation, alimony and child support analysis as well as investigative accounting and fraud analysis. Mr. Matheson also specializes in aassistance with case strategy formulation, research, & negotiations, along with ddeposition and court testimony. Mr. Matheson also effects due diligence negotiations for merger and acquisition (M&A) purposes and analysis to mediation attorneys to assist with settlements.

### **Specific Industry Experience**

Mr. Matheson litany of experience includes: 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**

Joseph has more than twenty-five (25) years of public and private accounting experience with international and local companies including Deloitte & Touche and AT&T. His experience encompasses: taxation, accounting for individuals, businesses and non-profit organizations with sales ranging from \$100,000 to \$35 Billion in sales. He has bbuilt and managed his own public accounting practice since inception in 1994.

### **Technology**

In the tech arena, Mr. Matheson has designed and built a complete customer database and financial reporting system for an Internet start-up company that was ultimately purchased by Pearson of England. Additionally, his experience has included: complete system and network design, data architecture and hardware needs. Joseph has diligently gathered data 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 aaccess database for program evaluation reporting. In addition, he has imputed ddata then imported into accounting system for financial reporting and completed migrations to new accounting systems. Mr. Matheson also provides services for data quality control, corporate accounts payable and accounts receivable, as well as disbursing and receiving checks and bank reconciliation, system and accounting procedures.