

Matthew B. Bishop, JD, CPA/PFS, CLU, ChFC, CFP®

Education

University of Florida
College of Law
Juris Doctor with Honors

Florida State University
College of Business
Bachelor of Arts in Accounting
Bachelor of Arts in Finance

Experience

- 1997 - Present **Bishop & Company, P.L., CPAs** Jacksonville, FL
Principal & Member
- Practice specializing in tax and personal financial planning
 - Provide tax consulting and compliance services to business owners, professionals, and high net worth individuals
- 1998 - Present **Bull & Bear Capital Advisors, LLC** Jacksonville, FL
Principal & Member
- Manage investment portfolios for clients
 - Create and implement financial plans
- 2001 - Present **Bull & Bear Brokerage Services, LLC** Jacksonville, FL
Principal & Member
- Implement insurance and investment programs for clients
 - Supervise firm's Registered Representatives
- 2004 - Present **Bishop & Bishop, P.L.** Jacksonville, FL
Principal & Member
- Provide legal services in tax, securities, estates and trusts
 - Litigate cases involving FINRA and fiduciary matters
- 1997 - Present **CERTIFIED FINANCIAL PLANNER™ Certificate Programs** Various
Instructor
- Instructed courses for CERTIFIED FINANCIAL PLANNER™ program for University of North Florida, Florida Community College Jacksonville, Florida State University, Nova Southeastern University, Keir Educational Resources, Deloitte & Touche LLP, Financial Planning Fast Track™ with Metropolitan State College of Denver, and SunAmerica Securities
 - Course Vitae includes Estate Planning, Income Tax Planning, Retirement Planning/Employee Benefits, Insurance Planning, Comprehensive Review

- 2003 - 2004 **Florida Community College at Jacksonville** Jacksonville, FL
Program Manager
- Responsible for the CERTIFIED FINANCIAL PLANNER™ Certificate Program
 - Course Vitae includes Estate Planning, Income Tax Planning, Retirement Planning/Employee Benefits, and Comprehensive Review
- 1996 - 1997 **Ernst & Young LLP** Jacksonville, FL
Tax Consulting Senior
- Coordinated implementation of tax planning ideas for regional client base
 - Provided trust consulting services for large family office
- 1995 - 1996 **Deloitte & Touche LLP** Jacksonville, FL
Senior Arbitrage Analyst
- Performed arbitrage rebate calculations on municipal securities
 - Performed cash flow verifications on refunded bonds
 - Supervised staff of from one to eight associates
- 1994 - 1995 **Barnett Banks, Inc.** Jacksonville, FL
Tax Analyst
- Worked for bank holding company in corporate tax function
 - Performed tax research and compliance
- 1993 - 1994 **New York Life/NYLife Securities** Jacksonville, FL
Agent and Registered Representative
- Marketed insurance and investment products
 - Prepared financial plans for individuals and businesses
- 1992 - 1993 **Guardian Life/Guardian Investor Services Corp** Tallahassee, FL
Agent and Registered Representative
- Marketed insurance and investment products
 - Prepared financial plans for individuals and businesses

Professional Licenses Florida Certified Public Accountant (passed 4:4 parts on first sitting)
Florida Attorney at Law
Florida Life, Health, and Variable Annuity Insurance Licenses
FINRA Series 6 Investment Company Representative
FINRA Series 7 General Securities Representative
FINRA Series 24 General Securities Principal
FINRA Series 27 Financial and Operations Principal
FINRA Series 53 Municipal Securities Principal
FINRA Series 63 Blue Sky Laws License
FINRA Series 65 Investment Adviser License

Professional Designations Certified Financial Planner™ (CFP®)
Chartered Financial Consultant (ChFC)
Chartered Life Underwriter (CLU)
Personal Financial Specialist (PFS) - conferred by the AICPA

Professional Societies American Institute of Certified Public Accountants - Tax and PFP Sections
Florida Institute of Certified Public Accountants
American Bar Association - Tax and Trust, Real Property, and Probate Sections
Florida Bar
Financial Planning Association - 1998 Jacksonville President

Honors & Awards Beta Alpha Psi (National Accounting Honor Society)
Golden Key National Honor Society
National Merit Scholar (FSU Full Tuition Scholarship Recipient)
Phi Delta Phi (Legal Honor Society)
FSU Law Contracts II Book Award
UF Law Estate Planning Book Award