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

Updated February 2, 2009

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