

# Matthew W. Curtis, CFA

## Professional Experience

Matthew Curtis is a Senior Analyst with VALUE Incorporated, a premier firm in the application of valuation and economic theory. He provides services to clients in a wide range of industries, including capital goods, financial services, healthcare, manufacturing, restaurants, retail, semiconductors, wholesale and various technologies. The scope of his work includes valuation analyses for mergers and acquisitions, financial reporting, corporate and estate tax planning, as well as litigation support.

Mr. Curtis also has developed skills in economic analysis, forecasting, securities analysis and investment consultation. He has significant experience with ERISA and DOJ regulations pertaining to sponsored retirement plans. Mr. Curtis has also provided valuations of numerous companies and industries to both institutional clients and high net worth individuals.

Mr. Curtis's background prior to joining VALUE Incorporated includes several years in the financial services industry. While working for a national financial services firm, he assisted in establishing and maintaining qualified and non-qualified retirement plans for many companies, ranging from small to Fortune 100. Mr. Curtis also worked as a sell-side equity analyst for an institutional brokerage firm, providing research on companies in a variety of industries, including semiconductors, technology and manufacturing. In this capacity, he provided investment consultation to mutual funds, hedge funds and high net worth individuals.

## Formal Education

**Master of Business Administration, Finance** – 2001  
University of Texas at Dallas, Richardson, Texas

**Bachelor of Science, Business Administration** – 1999 *cum laude*  
University of Texas at Dallas, Richardson, Texas

## Accreditations and Designations

Chartered Financial Analyst (CFA), designated by the CFA Institute (CFAI)  
Certified Fund Specialist (CFS), designated by the Institute of Business and Finance  
Series 6 Securities License, National Association of Securities Dealers  
Series 7 Securities License, National Association of Securities Dealers  
Series 63 Securities License, National Association of Securities Dealers

## **Organizations and Professional Associations**

Member, CFA Institute

Member, CFA Society of Dallas-Fort Worth

Member, Golden Key National Honor Society

## **Lectures and Appearances**

"Accounting & Finance for Attorneys" – Lighthouse Seminar Group – January 2005