

# Matt Bacon

## Wealth Manager

### Tulsa

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Matt Bacon has been serving high net worth investors for more than 20 years, specializing in portfolio management and comprehensive financial planning. Prior to joining HoganTaylor Wealth, he worked with Charles Schwab & Co., Inc., in Dallas and Tulsa as Vice President of Private Client Services. Matt has significant experience with very diverse and complex estate planning issues, saving and investing strategies, private equity offerings, and real estate investments.

### Representative Experience

- Created and managed diverse investment portfolios valued in excess of \$120 million
- Designed investment policy statements for individuals, corporations, foundations, and nonprofits
- Provided retirement planning and financial planning to executives of several Forbes Fortune 500 Companies
- Constructed 10b5-1 plans and stock option exercise strategies for executives of publicly traded companies
- 3(21) limited scope fiduciary for retirement plans
- Provided education to qualified retirement plan participants of several Fortune 500 Companies
- Consulted retirees on social security benefit strategies

## Professional & Civic Affiliations

- Financial Planning Association, Registered Financial Advisor
- Art and Humanities Council of Tulsa, Vice President for Planned Giving 2012-2015
- Art and Humanities Council of Tulsa, President 2014
- Art and Humanities Council of Tulsa, Treasurer 2010-2012
- Kiwanis Club of Tulsa, Chairman of the Investment Foundation Committee 2007-Present
- United States Masters Swimming, Tulsa Chapter, Treasurer 2013-2014

## Education

- B.S., Finance, University of Oklahoma

## Speaking Engagements

- Presenter, Understanding Fixed Income in Today's Markets, State Chapter of OSCP (Oklahoma Society of CPAs), March 2010
- Presenter, Investing Prudently: Active vs. Passive, State Chapter of OSCP (Oklahoma Society of CPAs), November 2013
- Presenter, Economy & Investing, HoganTaylor's Year-End CPE Program, December 2015

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