MARK MATSON

Mark Matson is CEO and founder of Matson Money Inc., a registered investment adviser company that manages in excess of $6.3 billion*. With over twenty years of experience in the financial industry, Mark is a regular contributor in the national media, both in print and on television. His optimistic outlook on finance, investing, and economic issues makes him a frequently sought expert on CNBC, Fox News, BNN, Fox Business News, and publications such as the Wall Street Journal, The New York Times, and Investment News.

As a dynamic public speaker, Mark has shared his message of free markets and global investing with thousands of people throughout the country. His direct approach, passion, and enthusiasm make him both a compelling speaker and a fierce proponent of free markets.

Mark has authored several books on the topic of investing and economics for both investors and financial professionals; he also hosts Matson Money Live!, a weekly live web-based show about investing, economics, and current events.

TELEVISION: CNBC “Kudlow Report,” CNBC “Power Lunch,” Fox Business News “Opening Bell,” Fox Business News “Power and Money,” Fox Business News “Closing Bell,” and CNBC Reports.

ARTICLES PUBLISHED IN: The Wall Street Journal, Investment News, SmartMoney.com, Forbes.com, The Business Courier, USA Today, Financial Services Advisor, Advisor Today, Personal Financial Planning Monthly and many more.

BOOKS: “Main Street Money: How to Outwit, Outsmart, & Out Invest the Wall Street Bullies,” “The Dirty Filthy Lies My Broker Taught Me, 101 Truths About Money & Investing,” “Confessions of a Commission Junkie,” and “FlashPoint: Mastering the Art of Economic Abundance.”

VIDEO: “How the Really Smart Money Invests” and “Navigating the Fog of Investing.”

AUDIO: The Seven Deadly Investor Traps that Destroy Your Wealth & Three Power Strategies to Fix your Portfolio, The Curriculum for Conscious Investing, The Investor Coaching Series, and Breakthrough to Abundance.

ONLINE: Matson Money Live! and Mark Matson TV.

Mark graduated from the Miami University with a B.S. in Business, double majoring in Finance and Accounting. Mark is the proud husband of Melissa and father of eight children. He is an avid cyclist and trains regularly for challenging races.

Connect with Mark Matson at:
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*As of 06/23/2015

JOE MATSON

Joseph Matson is president of the Physicians Financial Alliance and founder of the Matson Financial Group. He received the prestigious professional designations Chartered Life underwriter and Chartered Financial Consultant from American College, the nation’s oldest institution devoted exclusively to the academic study of financial services.

During his 40-year career in the financial services industry, Joe has taught the principles of financial planning to thousands of adults through the University of Cincinnati. Certified in Advanced Estate Planning and specializing in the needs of medical professionals for nearly 30 years, Joe is dedicated to helping physicians lower tax burdens, increase retirement income, and protect their assets.

Through intense estate case study and teamwork with CPA's and attorneys, Joe has honed the craft of applying state-of-the-art tools and a wide range of professional experience to the unique situations facing physicians. As a long-standing member of the National Planned Giving Council, Joe has acquired vast knowledge in navigating intricate estate plans and saving clients time and money.

Joe Matson has given hundreds of lectures, appeared on radio shows, and been published in several industry-related periodicals. Physicians Financial Alliance is the preferred provider of numerous physicians associations and medical societies.

ZACK SHEPARD

Zack Shepard is the Vice President of Communications at Matson Money, Inc., a Cincinnati-based investment adviser firm managing over $6.3 billion* for investors nationwide. Zack leverages his expertise and experience in business and marketing to coach hundreds of financial professionals across the country to implement the Free Market Portfolio investment strategy, and in turn, help thousands of investors nationwide to take a more prudent, long-term approach to investing and wealth management. As a research contributor to the Matson Money program, Navigating the Fog of Investing, Zack lent his hand to the production of a scathing rebuke of the financial industry and its marketing machine. As Associate Producer of the public television special Main Street Money, Zack helped bring the message of Nobel Prize-winning academic financial investment theories to Main Street investors.

In 2009, Matson Money launched its first live broadcast program hosted by Mark Matson, Michelle Matson, and Zack Shepard. Matson Money Live! can be seen on Tuesdays at 3pm ET on LiveStream. On the show, topics range from investments to politics and current events. Zack is not only the co-host of Matson Money Live!, but also a producer for the show, generating content and stories every week to bring to the audience.

Zack is a National Media Contributor to such popular media outlets as CNBC, Bloomberg, Fox Business, Businessweek, NY Post, Business Times, Financial Post, CFOWorld.com, The Washington Post, Drudgereport.com, Registered Rep, RIA Central, thestreet.com and Yahoo Finance.

Zack graduated from the University of Cincinnati with a B.S. in Business in 2002, an A.S. in Marketing in 2000 and was also an Accredited Investment Fiduciary (AIF) through the Center for Fiduciary Studies. He enjoys spending time with his wife and two daughters, and participating in sports including basketball and golf.

*As of 06/23/2015

ARTHUR B. LAFFER, PH.D.

Member of President Reagan's Economic Policy Advisory Board for both terms (1981-1989)
Founder and Chairman of Laffer Associates

Bachelors of Economics, Yale University
MBA, Ph.D., Economics, Stanford University

Dr. Laffer's economic acumen brings a distinct advantage to Matson Money, our coaches, and clients with insights on the implication of economic policy on savers and investors. Frequently referred to as "The Father of Supply-Side Economics," Dr. Laffer helps navigate the complexities of the economy, interest rates, and tax efficiency as it applies to portfolio construction.

A primary engineer of the Reagan economic recovery in the 1980s, his policies led to significant economic expansion in the 1980s. Dr. Laffer was also a founding member of the Congressional Policy Advisory Board, a select group of advisors who assist in shaping legislative policies for United States Congress. He was the first to hold the title of Chief Economist at the Office of Management and Budget.

Today, Dr. Laffer is the founder and chairman of Laffer Associates, an economic research and consulting firm that provides investment-research services to institutional asset managers. As a member of the Matson Money Academic Board, Dr. Laffer has also co-authored a paper with Mark Matson and Daniel J. List titled “The U.S. Corporate Tax Code: Ripe For Bipartisan Reform.”

R. LYMAN OTT, PH.D.

Bachelors of Mathematics and Education, Bucknell University
Masters of Mathematics, Bucknell University
Ph.D. Statistics, Virginia Tech

As an expert in the field of statistics, Dr. Ott lends his expertise to Matson Money and investors by actively analyzing and providing third party validation for the economic and financial research upon which our portfolios are constructed. His scrutiny indicates the probability of outcomes concerning the implementation of specific investing strategies. His analysis of the existence and confirmation of “The Barbell Effect” has a significant impact on the design of Matson Money portfolios.

Following graduate school and two years in the pharmaceutical industry, Dr. Ott became an Assistant Professor in the Department of Statistics at the University of Florida. He was named an Associate Professor in 1972 but returned to the pharmaceutical industry in 1975 as Head of the Biostatistics Department for Merrell National Laboratories. In 1984 he was appointed as Director of Biomedical Information Systems for Merrell Dow and in 1990 became Vice President of Global Systems and Quality Improvement in Research & Development for Marion Merrell Dow. He was appointed Sr. Vice President of Business Process Improvement in Research & Development in 1996 and Sr. Vice President responsible for late stage Development projects in 1998, both for Hoechst Marion Roussel (HMR).

Dr. Ott retired from the pharmaceutical industry in 1999; he continues to work with co-authors on new editions of his textbooks. He also serves on the Board of Trustees for Brown Mackie College, a for-profit, accredited educational system with campuses in Salina, KS, Kansas City, MO, and Oklahoma City, OK, and on the Board of Trustees for Presbyterian Manors of Mid-America which has 18 senior living communities in Missouri and Kansas.

Dr. Ott has been a member of the Industrial Research Institute, the Drug Information Association and the Biometric Society. In addition, he is a Fellow of the American Statistical Association and received the career Achievement Award from the Pharmaceutical Research and Manufacturers of America. He was also an all-American soccer player in college and is a member of the Bucknell University Athletic Hall of Fame.

EUGENE F. FAMA

Eugene F. Fama, 2013 Nobel laureate in economic sciences, is widely recognized as the “father of modern finance.” His research is well known in both the academic and investment communities. He is strongly identified with research on markets, particularly the efficient markets hypothesis. He focuses much of his research on the relation between risk and expected return and its implications for portfolio management. His work has transformed the way finance is viewed and conducted.

Fama is a prolific author, having written two books and published more than 100 articles in academic journals. He is among the most cited researchers in economics.

In addition to the Nobel Prize in Economic Sciences, Fama was the first elected fellow of the American Finance Association in 2001. He is also a fellow of the Econometric Society and the American Academy of Arts and Sciences. He was the first recipient of three major prizes in finance: the Deutsche Bank Prize in Financial Economics (2005), the Morgan Stanley American Finance Association Award for Excellence in Finance (2007), and the Onassis Prize in finance (2009). Other awards include the 1982 Chaire Francqui (Belgian National Science Prize), the 2006 Nicholas Molodovsky Award from the CFA Institute recognizing his work in portfolio theory and asset pricing, and the 2007 Fred Arditti Innovation Award given by the Chicago Mercantile Exchange Center for Innovation. He was awarded doctor of law degrees by the University of Rochester and DePaul University, a doctor honoris causa by the Catholic University of Leuven, Belgium, and a doctor of science honoris causa by Tufts University.

Fama is chairman of the Center for Research in Security Prices at Chicago Booth, which was founded 40 years ago to create the finest tools for tracking, measuring, and analyzing securities data. He is also an advisory editor of the Journal of Financial Economics.

Fama earned a bachelor's degree from Tufts University in 1960, followed by an MBA and PhD from the University of Chicago Graduate School of Business (now the Booth School) in 1964. He joined the GSB faculty in 1963.

Fama is a father of four and a grandfather of ten. He is an avid windsurfer and golfer, an opera buff, and a faded tennis player. He is a member of Malden Catholic High School's athletic hall of fame.