



# Qualifications

**YOUR BUSINESS, YOUR FUTURE, YOUR WAY**



**Matt Stone**  
CFP® CBA CBI®

## Education

### JUNE 2004

*Certified Financial Planner™* Course,  
College of Financial Planning, Denver, CO

### MAY 1991

BS Degree in Business Administration,  
Concentrations in Accounting and Finance,  
Wayne State College, Wayne, NE

## Industry Specific Education

### 2008

IBBA 345 *Tax Boot Camp for M&A Professionals*

IBBA 335 *Maximizing the Value of the Privately  
Held Company*

### 2007

IBBA 325 *Succession Planning: Exit Strategies  
for the Privately Held Company*

### 2006

IBA 1048 *Private Capital Markets*

IBA 8001A *Mastering Appraisal Skills  
for Valuing the Closely Held Business*

IBA 8001B *Mastering Appraisal Skills  
for Valuing the Closely Held Business*

IBA 1010 *How to Write Business Appraisal  
Reports*

IBA 1006B *Preparing for the Certified Business  
Appraiser Written Exam*

## Speaking Engagements

*How to Exit from Your Business In Style*

4384A *Importance of a Proper Business  
Appraisal in Financial Planning*, presented  
for CFP CEC

4384B *Business Exit Planning, Relating to  
Your Client's Needs*, presented for CFP CEC

## Professional Designations

### NOVEMBER 2007

CBI® – Certified Business Intermediary

### FEBRUARY 2007

CBA – Certified Business Appraiser

### JANUARY 2004

CFP® – Certified Financial Planner™  
Designation

## Professional Memberships

International Business Brokers Association, Inc.

The Institute of Business Appraisers, Inc.

## APPRAISAL EXPERIENCE

NAICS	SIC	INDUSTRY	GROSS REVENUE
423720	5074	Wholesale Plumbing	\$400,000 - \$500,000
523930	6282	Investment Advice	\$175,000 - \$220,000
811191	7549	Auto Service	\$300,000 - \$530,000
237210	1521	Land Development	\$300,000 - \$390,000
453910	5999	Pets Store & Supplies	\$300,000 - \$420,000
621330	8049	Health Practitioners	\$250,000 - \$350,000
611511	7231	Cosmetology School	\$1,700,000 - 2,300,000
238210	1731	Electrical Contracting	\$6,500,000 - 7,500,000
524210	6331	Insurance Agencies	\$1,000,000 - 1,500,000