

Matt Bacon

Partner

Tulsa

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Matt is a partner with HoganTaylor Wealth and leads the firm's Wealth practice as Chief Executive Officer, which includes Investment Management, Financial Planning, and Tax Planning services. He has close to 30 years of experience, specializing in portfolio management and comprehensive financial planning.

Prior to joining HoganTaylor Wealth, Matt 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. In addition to investment management services, Matt has served as Trustee to several high net worth families, helping manage trust assets, facilitate family governance, and ensure that wealth is preserved and distributed according to the family's wishes and values.

Above all, Matt is passionate about helping families and organizations thrive through thoughtful collaboration, strategic problem-solving, and the implementation of efficient investing and financial strategies that support long-term success.

Representative Experience

- Designed and managed diverse investment portfolios valued in excess of \$350 million
- Created 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
- Served as 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
- Served as Trustee for high-net-worth families

Professional & Civic Affiliations

- Registered Financial Advisor, Financial Planning Association
- Former Vice President for Planned Giving, Arts and Humanities Council of Tulsa
- Former President, Arts and Humanities Council of Tulsa
- Former Treasurer, Arts and Humanities Council of Tulsa
- Chairman of the Investment Foundation Committee, Kiwanis Club of Tulsa
- Former President, Kiwanis Club of Tulsa
- Former Treasurer, United States Masters Swimming, Tulsa Chapter

Education

- Bachelor of Science, Finance, University of Oklahoma

Speaking Engagements

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

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