Tax and Retirement Seminar – Speaker Bios

Paul Matson Bio

Paul Matson has served since 2003 as chief executive of the Arizona State Retirement System, overseeing an approximately $40 billion investment portfolio, $25 million annual appropriated budget, and 220 employees. Oversight includes pension, health insurance, long term disability and defined contribution plans.

Reporting divisions include investment management, member services, financial services, information technology, budget, human resources, strategic planning and legislative and public affairs. Mr. Matson reports to a nine-member Board of Trustees.

In 2012, Mr. Matson was honored as "Leader of the Year in Public Policy – Government" by the Arizona Capitol Times. Mr. Matson was recognized for his work leading the ASRS through challenging economic times and an active legislative session in which lawmakers focused on the state's public pension plans. Mr. Matson joined the ASRS in 1995 as chief investment officer, responsible for the internal and external multi asset-class investment management of the fund and development of the internal investment management division of the ASRS.

From 1994 to 1995, Mr. Matson served as senior investment advisor at the Treasury Division, Workers Compensation Board, Alberta, Canada. His overall responsibilities were for asset mix, asset class selection, manager analysis and performance monitoring for the multi-billion dollar fund.

From 1989 to 1994, Mr. Matson served as financial analyst and portfolio analyst at the Investment Management Division, Alberta Treasury. His duties included performance measurement, derivatives analysis, fixed income analysis, asset mix analysis, liability analysis and various portfolio support activities.

Mr. Matson is also on and served as chairperson of the Arizona Deferred Compensation Committee. He also serves on the Arizona Property and Casualty Insurance Guaranty Fund Board and its Investment Committee, and is a founding member of the Canada-Arizona Business Council. He formerly served on the Investment Operations Committee of the Province of Alberta Treasury Investment Division, and is a graduate of the FBI Citizen's Academy.

* Approximations are utilized.

Education

- Master of Arts, International Relations, Arizona State University, Tempe, Arizona. (Research focus on international terrorism)
- Master of Business Administration, Simon Fraser University, Canada. (Research focus on financial derivatives)
- Bachelor of Commerce, University of Alberta, Canada
- Chartered Alternative Investment Analyst (CAIA) Charter Holder

- Chartered Financial Analyst (CFA) Charter Holder
- Fellow of the Canadian Securities Institute (FCSI)
- Canadian Investment Manager (CIM)
- Certified Cash Manager (CCM)

Doug Ewing Bio

Doug Ewing, JD, CFP, RICP, started his career with Nationwide® in 2019 with more than 16 years of industry experience. Doug serves the western region for the Nationwide Retirement Institute, educating advisors, clients, plan sponsors and plan participants about the latest in retirement income solutions. Prior to Nationwide, Doug was with Transamerica Capital Inc. where he was responsible for developing and delivering consultative sales content for annuity, retirement, mutual fund and life wholesalers. An accomplished public speaker with extensive main stage, breakout and national webinar presentation experience, Doug covers topics including health care, long-term care, Social Security and tax-efficient retirement income. Doug was admitted to the Massachusetts Bar in 1990 and got his start in the financial industry in 2003 as a financial advisor with Legg Mason Wood Walker. He has earned both CFP and RICP designations and is FINRA Series 7 and 66 licensed.

Lisa Novack Bio

Lisa leads IRS industry and practitioner outreach programs for Arizona. As the senior stakeholder liaison, she works with practitioner and small business organizations to provide members with information about the policies, practices and procedures the IRS uses to ensure compliance with the tax laws and securing tax data.

Lisa joined the IRS in 1987 as a tax auditor in Indianapolis, Ind. She moved to Phoenix, Ariz. in 1998 and has been involved in the education and outreach arm of the IRS since 2000. She has developed hundreds of relationships with industry partners and state and local government agencies.

Lisa holds a Bachelor of Arts degree in Criminal Justice from Indiana University, Bloomington, Ind.

Stephanie Michael Bio

Stephanie Michael began working for the Arizona Department of Revenue (ADOR) in 2019 and currently holds the Community Information Office II position within ADOR’s Education and Compliance Division. She enjoys assisting taxpayers and professionals to better understand the world of taxation. Before coming to ADOR, Stephanie served Arizona Veterans’ as the Military Family Relief Fund (MFRF) Program Coordinator and was able to award over $1.2 million dollars to Veteran families in need during her time in this position. Stephanie has an undergraduate degree in Social Work and has used this to house Arizona’s homeless population since 2014. In May 2020 Stephanie will graduate from Arizona State University with a master’s degree in Public Administration and plans to use her combined education to be the change she wants to see in the world.