

Moon, Schwartz & Madden

QDRO and Valuation Consultants

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CURRICULUM VITAE FOR JOHN C. MADDEN

EDUCATION

- BA in Finance/Real Estate, Temple University, Philadelphia, 1994

STOCK OPTIONS AND FINANCE EXPERIENCE

- Held Series 7 & 63 Licenses.
- Stock, Bond and Mutual Fund sales 1994
- Interest calculations/Mortgage refinancing 1994-1995
- Stock Option valuations since 1995
- Professional market maker in stock options, Philadelphia/Pacific Stock Exchange '95-99

CONSULTING EXPERIENCE

- Partner with Moon, Schwartz & Madden since 2004, Associate 1999-2003
- QDRO and Pension Valuation preparation since 1999.
- Executive Committee Member of the Qualified Domestic Relations Order National Education Society (“QDRONES”), an organization of attorneys and valuation experts who specialize in issues related to the division of retirement benefits.
- Founding member of **QDRO Counsel™**, a legal services company providing online preparation of QDROs and valuation reports.
- Member of the American Academy of Economic and Financial Experts (AAEFE)
- Volunteer with the Western States Pension Assistance Project
- Board of Directors / Wayne Thiebaud Foundation (2022)

COURT QUALIFIED EXPERT WITNESS

- Qualified as an expert witness in actuarial pension valuations, annuities, stock options and (Q)DROs in the following counties:

California: Alameda, El Dorado, Los Angeles, Marin, Sacramento, Santa Clara, San Diego, San Mateo, Sutter, Placer and Contra Costa counties.

Illinois: Cook County – pension valuations, survivor benefits and annuities

New Mexico: Santa Fe - pension valuations, survivor benefits and annuities

Magistrates Court of Western Australia: Admitted as Single Expert Witness pursuant to Part 15 Division 5, Subdivisions 4, 5 and 6, of the Family Court Rules 2021 (WA), for the valuation of Federal Employees' Retirement System (FERS) and Thrift Savings Plan (TSP) benefits.

PUBLICATIONS

- "It's a simple 401(k) QDRO, what could go wrong?" – *Los Angeles Family Law Section*, Fall 2020 Issue, Volume 18, Number 3.
- "How to correctly value the community property interest in a public retirement plan such as SBCERS, CalPERS or CalSTRS" – *Santa Barbara Lawyer*, April 2020, Issue 571.
- "Marital Property in Illinois Public Pension Plans (Parts I&II): Actuarial Valuation, QILDROs and the QILDRO Discount" – *Illinois State Bar Association Family Law Newsletter*, April 2024, Vol 67, No 8.

(M)CLE SPEAKING ENGAGEMENTS

American Academy of Matrimonial Lawyers (AAML) Symposium
The Rutter Group, Retirement Plan Seminar
Association of Certified Family Law Specialists (ACFLS)
Continuing Education of the Bar – California (CEB)
Collaborative Practice California Annual Conference
Financial Planning Association of Northern California
Sacramento Collaborative Practice Group
Southern California Mediation Association (SCMA)
Family Mediation Institute Alameda County
Estate Planning Council of Diablo Valley
Co-Presentation with CalSTRS Community Property Manager, Valerie Kingdom
Sacramento Law Library
University of the Pacific, McGeorge School of Law

As well as presentations to the following Bar Associations:

Contra Costa County	Stanislaus County
Alameda County	Santa Clara County
Fresno County	Solano County
Marin County	Riverside County
Napa County	North County San Diego
Orange County	Los Angeles County
Placer County	Long Beach
Sacramento County	Beverly Hills
San Francisco County	South Bay
San Joaquin County	Chicago Bar Assoc.-Young Lawyers Section
San Mateo County	