

MILLER COLLEGE OF BUSINESS

PROFESSIONAL BACKGROUND

Name: Mr. Martin J. Pierce

Rank: Assistant Lecturer

Office Address: WB111

Degrees

Postgraduate Accounting Studies Degree:

Name of Degree: Postgraduate Accounting Studies

Year Conferred: 1972

Degree-Granting Institution: University of Detroit

Principal Academic Units:

Major Fields of Study: Accounting

Minor Field of Study:

Dissertation Title:

M.B.A. Degree:

Name of Degree: M.B.A.

Year Conferred: 1971

Degree-Granting Institution: Michigan State University

Principal Academic Units:

Major Fields of Study: Finance

Minor Field of Study:

Dissertation Title:

B.A. Degree:

Name of Degree: B.A.

Year Conferred: 1970

Degree-Granting Institution: Olivet College

Principal Academic Units:

Major Fields of Study: Economics

Minor Field of Study: French, Business Law

Dissertation Title:

Professional Certifications

1. "PFS". (October 1, 2019).
2. "FINRA Series 65". (September 15, 2019).
3. "CFP". (March 1, 2019).
4. "CPA". (January 1, 1980).
5. "CMA". (June 30, 1975).

SCHOLARLY ACTIVITIES

Work-in-Progress

Working Paper

1. Pierce, M. J., Athavale, M. V. *Case in retail Financial Planning*.

Professional Presentations

1. Pierce, M. J., Careers in Financial Planning, Wabash College. (March 29, 2019).
2. Pierce, M. J., IU Kelley School of Business COMPASS III, Indiana University. (March 14, 2019).
3. Pierce, M. J., "A Peek Behind the RIA Curtain", Purdue University. (February 21, 2019).
4. Pierce, M. J., Butler University Guide to Professional Success Panel, Butler University Lacy School of Business. (February 6, 2019).
5. Pierce, M. J., McDermond Center Industry Insight Series - Investment Management Panel, Depauw University. (November 19, 2018).
6. Pierce, M. J., Kelley School of Business, COMPASS II, Indiana University Kelley School of Business. (November 8, 2018).
7. Pierce, M. J., "A Peek Behind the RIA Curtain", IU Kelley School of Business FPA Club. (October 22, 2018).
8. Pierce, M. J., Outplacement in Economic Uncertainty, Grace, Chapman & Broussard. (November 15, 1989).
9. Pierce, M. J., "Accounting Careers as a Sport", University of Dallas. (September 18, 1985).

10. Pierce, M. J., Business and Industry Roundtable, National Association of Accountants. (October 3, 1984).
11. Pierce, M. J., Business Career Searching, Southern Methodist University. (June 17, 1982).
12. Pierce, M. J., IMA Newsletter Interview, Institute of Management Accounting. (April 1, 1982).
13. Pierce, M. J., "Accounting Careers as a Sport", Beta Alpha Psi, Indiana University. (April 13, 1977).

SERVICE ACTIVITIES

Professional Development and Participation

1. Continuing Education, Service, Chapter Meeting. (March 2020 - March 2020).
2. Continuing Education, Service, CFA University Research Challenge. (February 2020 - February 2020).
3. Continuing Education, Service, CFA Society Joint CFP Forecast Meeting. (February 2020 - February 2020).
4. Continuing Education, Service, CFP Continuing Education November Meeting. (November 2019 - November 2019).
5. Continuing Education, Service, Estate Planning Council of Indianapolis meeting. (October 2019 - October 2019).
6. Continuing Education, Service, Fall FPA meeting in Indianapolis. (September 2019 - September 2019).
7. Continuing Education, Service, Financial Planning Association Quarterly meeting. (May 2019 - May 2019).
8. Continuing Education, Service, Financial Planning Association Quarterly meeting. (March 2019 - March 2019).
9. Continuing Education, Service, Financial Planning Association Quarterly meeting. (November 2018 - November 2018).
10. Continuing Education, Service, Financial Planning Association Quarterly meeting. (August 2018 - August 2018).
11. Continuing Education, Service, Financial Planning Association Quarterly meeting. (May 2018 - May 2018).

12. Continuing Education, Service, Financial Planning Association Quarterly Meeting. (March 2018 - March 2018).
13. Workshop, Service, Straight Answer Saturday
Secretary of State
Financial Planning Association
University of Indianapolis. (February 2018 - February 2018).

Work History

1. Financial Advisor, Valeo Financial Advisors. (March 1, 2017 - July 31, 2019).
2. Consulting, MJ Pierce. CPA, CMA, MBA. (2006 - 2017).
3. Commercial Pilot - CFII, Aviation Company - Cedar Springs Aviation. (April 1, 2002 - April 1, 2006).
4. Consultant, AON Hewitt. (January 1, 1977 - March 31, 2002).
5. Financial Accounting Manager, Ball Corporation. (January 1, 1992 - December 31, 1996).
6. Managing Partner, Pierce Johnson Management Search Consultants. (August 1, 1975 - January 31, 1991).
7. Audit, Tax and SEC Reporting, Deloitte. (December 1, 1970 - June 30, 1975).