

Executive Profile



**R. Matthew Pate,
JD, LL.M.**



Corporate Vice President

*Manager, Case
Development Unit*

The Nautilus Group®

Matthew joined The Nautilus Group® in 2004 after receiving his Masters in Law in Taxation from SMU's Dedman School of Law. He is currently the head of the Estate and Business Planning Case Development Unit, which provides Nautilus Members with detailed technical analyses of client documents, highly customized client presentations and research and brainstorming support for tax, legal and sales related questions.

Matt has extensive experience in many areas including sophisticated estate planning techniques, business succession planning, tax issues involving closely held corporations, partnerships and LLCs, qualified and non-qualified benefit plans, split dollar insurance arrangements, asset protection strategies, and charitable planning techniques.

While primarily responsible for managing the day to day operations of Case Development, Matt is frequently involved in agent consultation and case design, putting a primary emphasis on customizing the presentation to suit the unique circumstances of the case parameters, agent's needs, and client's objectives. He also is frequently involved in new member orientation programs, as well as intra-office training and personnel development, seeking continuous improvement in the delivery of services to Members as well as the unit's technical skills, sales knowledge and product offerings.

Matt received his undergraduate degree from Georgetown University, obtaining a major in three subjects—accounting, finance and international business. He graduated from the University of Texas School of Law in 2001, where he served as Executive Editor of the Texas Review of Law and Politics. While in college and law school, Matt worked for a DC accounting firm, and held clerkships with a large Dallas law firm and the Texas Office of the Attorney General.

In his free time, Matt enjoys spending time in Colorado, skiing in the winter and mountain climbing and golfing in the summer. He also considers himself an amateur chef, with a unique love of Southwestern cuisine, having grown up in the West Texas town of El Paso. He lives in Dallas with his wife, Catherine, their two children, Presley and George.

