## BEFORE THE PUBLIC SERVICE COMMISSION OF THE STATE OF MISSOURI

In the Matter of the Application of Matrix Telecom, Inc. d/b/a Excel Telecommunications for a Certificate of Service Authority to provide Basic Local Telecommunications, Non-Switched Local Exchange Services and Resold Interexchange Service in the State of Missouri and to Classify Said Services and the Company as Competitive

Case No.:

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## APPLICATION FOR CERTIFICATE OF SERVICE AUTHORITY TO PROVIDE BASIC LOCAL EXCHANGE, NON-SWITCHED LOCAL EXCHANGE AND INTEREXCHANGE TELECOMMUNICATION SERVICES AND FOR COMPETITIVE CLASSIFICATION

COMES NOW Matrix Telecom, Inc. d/b/a Excel Telecommunications, a Texas corporation ("Applicant" or "Excel"), by its undersigned counsel, and hereby applies pursuant to sections 392.361, 392.410, 392.420, 392.430, 392.440, 392.450 and 392.470 RSMo and 4 CSR 240-2.060 and 4 CSR 240-3.510 for authority to provide a) facilities-based and resold basic local, telecommunications service in portions of the State of Missouri; b) non-switched local exchange and resold interexchange telecommunications service state wide and to classify said service and Applicant as competitive. Pursuant to Section 392.420 and 392.361, RSMo and 4 CSR 240-32.010(2) Excel also seeks a waiver of certain Commission rules and statutory provisions. In support of its Application, Excel states as follows:

1. Matrix Telecom, Inc. d/b/a Excel Telecommunications is a corporation duly organized and existing under and by virtue of the laws of the State of Texas, and is duly authorized to conduct business in Missouri. The nature of Applicant's business is telecommunications. Matrix Telecom Inc. was previously granted certificate of service authority from the Missouri Public Service Commission to provide Local Facilities-Based services in Case No. CA-2005-0393 (Order issued October 31, 2005) and interexchange reseller services in Case No. XA-2004-0238 (Order issued January 18, 2004). Pursuant to 4 CSR 240-2.060(1)(C), a Certificate of Authority to transact business in Missouri and a certificate of good standing, issued by the Missouri Secretary of State, and the registration of the Applicant's fictitious name are

attached hereto and incorporated herein by reference as **Exhibit A**. Applicant's principal place of business is 433 E. Las Colinas Blvd., Suite 400, Irving, Texas 75039. Its telephone number is 972-910-1900 and its toll-free customer service number is 1-800-411-0111.

2. An officer's verification of the information contained in the Application is attached hereto.

3. All correspondence, communications, pleadings, notices, order, and decisions relating to this Application should be addressed to:

Mark W. Comley Newman, Comley & Ruth P.C. 601 Monroe Street, Suite 301 P.O. Box 537 Jefferson City, MO 65102 Telephone: (573) 634-2266 Facsimile: (573) 636-3306

Thomas M. Forte Consultant to Matrix Telecom, Inc. d/b/a Excel Telecommunications Technologies Management, Inc. 2600 Maitland Center Parkway, Suite 300 Maitland, FL 32751 Telephone: (407) 740-3001 Facsimile: (407) 740-0613

All inquiries or communications regarding the ongoing operations of Excel should be addressed to:

Aurora Ares Regulatory Affairs Matrix Telecom, Inc. d/b/a Excel Telecommunications 433 E. Las Colinas Blvd., Suite 400 Irving, TX 75039 Telephone: (972) 910-1900 Facsimile: (888) 411-0111

4. By this Application, Excel requests a certificate of authority to provide competitive facilities-based and resold basic local exchange to residential and business customers throughout all exchanges served by Southwestern Bell Telephone, L.P. d/b/a AT&T Missouri (AT&T Missouri). The exchanges in which Excel seeks authority are listed in the approved tariffs of AT&T Missouri, and will be listed in Applicant's basic local service tariff.

Excel's proposed service areas will follow the respective exchange boundaries of the stated incumbent LEC and shall be no smaller than an exchange as required by Section 392.455(3) RSMo. Applicant may seek authorization to provide service in exchanges served by other incumbent LECs in a subsequent proceeding.

5. Upon certification, Applicant will provide services by combining unbundled network elements and reselling services obtained from AT&T Missouri pursuant to interconnection agreement(s) that Applicant has filed or will file with the Commission. Applicant may also acquire services and facilities from other carriers operating in the State. Excel will, through interconnection with other carriers or resale of other carriers' services, provide access to 911 and enhanced 911 emergency services and provide directory assistance and operator assisted calling, dual party relay services, and other miscellaneous services currently provided by incumbent local exchange carriers. Excel intends to provide local service using unbundled network combinations offered by AT&T Missouri and via resold services. Excel may eventually provide local services via its own switching facilities. Excel plans to commence offering basic local service upon receiving Commission approval of its interconnection agreement(s) and related tariffs.

6. Pursuant to this Application, Excel also seeks authority to offer and provide all forms of non-switched local exchange and facilities-based and resold interexchange service to customers throughout the State of Missouri as those services are defined in 386.020(4) RSMo. The Applicant has received authority to provide interexchange access in 48 states and local access in 19 states. Excel has not been denied authority in any state.

7. Applicant possesses the technical and managerial expertise and experience necessary to provide the services it proposes as required by Section 392.455(1) RSMo. Excel will initially utilize resold services and combinations of network elements provided by the underlying carrier(s). Underlying carriers will perform all local switching, routing and call completion functions. Company personnel have experience working with underlying carriers of long distance and local services. Applicant's technical and managerial personnel are well qualified to direct the delivery and billing of the proposed services. A listing of Applicant's principal management employees and their qualifications is attached hereto and incorporated

herein as Exhibit B.

8. Applicant possesses the necessary financial resources and abilities to provide the services it proposes as required by Section 392.455(1), RSMo and has the necessary capital to conduct its proposed operations in Missouri. Attached as **Exhibit C** and marked highly confidential (HC) is a copy of the Applicant's financial statements.

9. Excel seeks classification of itself and its services as competitive, with accompanying reduced regulation pursuant to Section 392.361 RSMo and 4 CSR 240-3.510(1)(A). Applicant believes that its proposed services will be subject to sufficient competition to justify a lesser degree of regulation and that granting this request will allow greater price and service options for telephone users.

10. Excel will offer basic local telecommunications services as a separate and distinct service in accordance with applicable law. Excel will give consideration to equitable access for all Missourians, regardless of where they might reside or their income, to affordable telecommunications services in Excel's proposed service areas in accordance with law.

11. Applicant will not unjustly discriminate among its customers as is prohibited by Section 392.200, RSMo. Applicant is willing to comply with all applicable Commission rules and is willing to meet all relevant service standards including, but not limited to, quality service, billing, and tariff filing and maintenance with the Commission's requirements for incumbent local exchange carrier(s) with whom Excel seeks authority to compete. Additionally, Excel agrees that, pursuant to Section 392.455(3), RSMo, its service area shall be no smaller than an exchange. Consistent with the Commission's treatment of other certificated competitive local exchange telecommunications companies, Applicant requests the following statutes and regulations be waived for Excel and its basic and non-basic local exchange service offerings:

## **STATUTES**

	51110		
392.210.2	- Uniform Sy	stem of Accounts	
392.240.1	- Just and Re	asonable Rates	
392.270	- Ascertain P	Property Values	
392.280	- Depreciatio	on Accounts	
392.290	- Issuance of	Securities	
392.300	- Acquisition	of Stock	

392.310	-	Issuance of Stock & Debt
392.320	-	Stock dividend payment
392.330	-	Issuance of securities, debt and notes
392.340	-	Reorganization(s)

## **RULES**

4 CSR 240-3.520	Applications to sell or transfer assets
4 CSR 240-3.525	Applications to merge or consolidate
4 CSR 240-3.530	Applications to issue stocks, obtain loans
4 CSR 240-3.535	Applications to acquire stock
4 CSR 240-3.545(8)(C)	Listing of Waivers in Tariff
4 CSR 240-3.550	Telco Records and Reports (except (5)(B), (D) and
	(E))
4 CSR 240-3.555	Residential Customer Inquiries
4 CSR 240-3.560	Procedure for Ceasing Operations
4 CSR 240-10.020	Depreciation Records
4 CSR 240-30.020	Residential Telephone Underground Systems
4 CSR 240-30.040	Uniform System of Accounts
4 CSR 240-32.010	General Provisions
4 CSR 240-32.040	Metering, Inspections and Tests
4 CSR 240-32.050	Customer Services
4 CSR 240-32.060	Engineering and Maintenance
4 CSR 240-32.070	Quality of Service
4 CSR 240-32.080	Service objectives and surveillance levels
4 CSR 240-32.090	Connection of equipment and Inside Wiring
4 CSR 240-32.100	Provision of Basic Local and Interexchange Services
4 CSR 240-32.130-170	Prepaid Calling Cards (except 32.140 and 32.150(1))
4 CSR 240-32.180-190	Caller ID blocking requirements
4 CSR 240-33.010	Service and Billing Practice General Provisions
4 CSR 240-33.040	Billing and Payment standards
4 CSR 240-33.045	Clear identification and placement of charges on bills
4 CSR 240-33.050	Deposits
4 CSR 240-33.060	Residential Customer Inquiries
4 CSR 240-33.070	Discontinuance of service
4 CSR 240-33.080	Disputes by Residential Customers
4 CSR 240-33.090	Settlement agreements with residential customers
4 CSR 240-33.130	Operator service requirements
4 CSR 240-33.140	Payphone requirements (except (2))
4 CSR 240-33.150	"Anti-slamming" requirements
4 CSR 240-33.160	Customer Proprietary Network Information

12. Applicant acknowledges 4 CSR 240-3.510(1)(C), which requires that a tariff and any applicable interconnection agreements must be filed with the Commission and approved before service can be provided. The tariff(s) for Excel is attached hereto and incorporated herein by reference as **Exhibit D**.

13. Applicant submits that the public interest will be served by Commission approval of this Application because Applicant's proposed service will create and enhance competition and expand customer service options, consistent with the legislative goals set forth in the Telecommunications Act of 1996 and Chapter 392, RSMo. Prompt approval of this Application also will expand the availability of innovative, high quality and reliable telecommunications services within the State of Missouri.

14. Notwithstanding the provisions of Section 392.500, RSMo, as a condition of certification and competitive classification, Excel agrees that, unless otherwise ordered by the Commission, Excel's originating and terminating switched exchange access rates will be no greater than the lowest Commission-approved corresponding access rates in effect for each ILEC within those service area(s) in which Applicant seeks authority to provide service. Additionally, pursuant to the Commission's Report and Order in Case No. TO-99-596, Excel agrees that if the ILEC in whose service area the Applicant is operating decreases it originating and/or terminating access rates within thirty (30) days of the ILEC's reduction of its originating and/or terminating access rates in order to maintain the cap on switched access rates.

15. Excel has no pending or final judgments or decisions against it from any state or federal agency or court that involves customer rates or service.

16. Excel has no annual report or assessment fees that are overdue.

17. Applicant states that it will undertake all necessary measures to ensure its contracts with other companies and carriers do not contain provisions preventing delivery of traffic to any telephone exchange area, and that such measures include but are not limited to:

•Prevention of call blocking and/or call gapping based on the cost of traffic termination.

•Preventing the alteration or stripping of Calling Party Number Identification.

•Ensuring sufficient network capacity exists to process all traffic according to industry accepted practices.

WHEREFORE, Applicant Matrix Telecom, Inc. d/b/a Excel Telecommunications respectfully requests that the Commission grant it a certificate of service authority to provide

facilities-based and resold basic local telecommunications service, non-switched local exchange and resold interexchange service as herein requested, classify Applicant and Applicant's proposed services as competitive, and grant waivers of aforesaid statutes and regulations, as expeditiously as possible.

Respectfully submitted,

/s/ Mark W. Comley Mark W. Comley #28847 Newman, Comley & Ruth P.C. 601 Monroe Street, Suite 301 P.O. Box 537 Jefferson City, MO 65102 Telephone: (573) 634-2266 Facsimile: (573) 636-3306 Email: comley@ncrpc.com

ATTORNEYS FOR APPLICANT Matrix Telecom, Inc. d/b/a Excel Telecommunications

## **CERTIFICATE OF SERVICE**

I do hereby certify that a true and correct copy of the foregoing document has been served electronically on the Office of Public Counsel at <u>opcservice@ded.mo.gov</u> and on the General Counsel's office at <u>gencounsel@psc.mo.gov</u> this 24<sup>th</sup> day of January, 2013.

/s/ Mark W. Comley

#### AFFIDAVIT

STATE OF TEXAS ş ş ş COUNTY OF DALLAS

Jerry Ou, being first duly sworn, deposes and says: That he is President for Matrix Telecom, Inc. d/b/a Excel Telecommunications the Applicant in the foregoing Application.  $\overline{\ }$ 

The undersigned states that he has read the foregoing Application, knows the contents thereof and is authorized to verify the accuracy of same; and that the statements contained in the Application are true to his best knowledge, information and belief.

Jerry Ou, President Matrix Telecom, Inc. Ab/a Excel Telecommunications Subscribed and sworn to before me this 18th day of 2013. Notary Public 12

My commission expires:



## MATRIX TELECOM, INC. D/B/A EXCEL TELECOMMUNICATIONS

## EXHIBIT A

Missouri Secretary of State Certificate of Authority and Certificates of Good Standing

# **STATE OF MISSOURI**



## Jason Kander Secretary of State

## CORPORATION DIVISION CERTIFICATE OF GOOD STANDING

I, JASON KANDER, Secretary of the State of Missouri, do hereby certify that the records in my office and in my care and custody reveal that

## MATRIX TELECOM, INC.

using in Missouri the name

## MATRIX TELECOM, INC. F00399876

a TEXAS entity was created under the laws of this State on the 18th day of August, 1994, and is in good standing, having fully complied with all requirements of this office.

IN TESTIMONY WHEREOF, I have set my hand and imprinted the GREAT SEAL of the State of Missouri, on this, the 24th day of January, 2013

ANDER

Secretary of State



Certification Number: 15150411-1 Reference: Verify this certificate online at https://www.sos.mo.gov/businessentity/soskb/verify.asp

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	State of Missouri			. Date File	d: 08/04/2010
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The undersigned	is doing business under the following	name and at the f	2		Registration #
	be registered: Excel Telecommunicati	ons			
Business Address	7171 Forest Lane, Suite 700 (PO Box may only be used in addition to a phy	vsical street address)			
City, State and Zi	p Code: Dallas, TX 75230				······
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## MATRIX TELECOM, INC. D/B/A EXCEL TELECOMMUNICATIONS

## EXHIBIT B

Profiles of Key Management Employees

#### Jerry Ou - Chief Executive Officer (CEO)

Jerry has served as the Chief Executive Office of Matrix Telecom, Inc. since 2011. Jerry previously served as COO at Comtel Assets team conjunction with Denham Capital Management (Formerly Sowood Capital Management). Mr. Ou was focused on the restructuring of the business through optimizing the organizational chart as well as implementing a new network and a new technological infrastructure. Mr. Ou also repositioned the company as a wholesale company, bolstering its marketing efforts into indirect distribution channels. Mr. Ou also served as president of Mercantel Communications LP and has been in thelecommunications for the last ten years. Prior to Mercantel, Mr. Ou worked with Simplified Development – the technology provider for Mercantel – as Senior Consultant focusing primarily on the Asian-American customer base working with such customers as PCCW. Prior to Simplified, Mr. Ou was a financial analyst with Goldman Sachs subsidiary structuring mezzanine finance deals that focused primarily on real estate bond offerings from banks such as JP Morgan and the Bank of Tokyo. Mr. Ou was also involved in managing real estate assets for the Goldman Sachs fund and the Archon Group. Mr. Ou graduated from Harvard University with an honors degree in Economics.

#### Michael Simpson - Chief Financial Officer/Chief Restructuring Officer

Michael Simpson has served as the Chief Financial Officer of Matrix Telecom, Inc. since 2010 and is in charge of all of the financial operations of the company. Mike was the Chief Financial Officer at CompuCom immediately before his time with Matrix. Prior to joining CompuCom, Mike served as Vice President of Portfolio Operations at Platinum Equity, a global firm specializing in the merger, acquisition, and operation of companies. At Platinum Equity, Mike was responsible for transitioning newly acquired companies from a financial and operations perspective. Most recently, as part of his role at Platinum Equity, he managed both the CompuCom and GE IT Solutions acquisitions. Mike directed the transitional finance activities as CompuCom reverted from public to private status, and focused on EBITDA and margin improvement. Previously, he served as Chief Financial Officer for Billing Concepts, a Platinum Equity company based in San Antonio, Texas. Mike's other positions were Mike served as Vice President of Finance for HBS Billing Services, Ltd., and functioned in several accounting capacities with leading firms such as KPMG Peat Marwick, LLC., Gene Brehm & Company, LLC. and Wolfe & Company, LLC. Mike holds an MBA in finance from St. Mary's University, and a bachelor's degree in accounting from Abilene Christian University.

#### Stephen A. Wagner - Executive Vice President, Customer Operations

Mr. Wagner, EVP Customer Operations, joined Matrix Telecom in December 2005 after serving over 10 years in various management roles at Global Crossing and Frontier Communications in sales, client services, account management and channel sales. Prior to that, Mr. Wagner worked in the shipping and transportation industry. Mr. Wagner is responsible for all customer facing operations at Matrix Business Technologies including account management, customer service, offshore support and provisioning. He is a graduate of St. John Fisher College in Rochester, New York and has attended the Simon Business School at the University of Rochester.

#### Nermin Selimic - Executive Vice President of Sales and Marketing

Mr. Nermin Selimic serves as Executive Vice President of Sales and Marketing at Matrix. Mr. Selimic served as a Vice President of Business Development and Marketing at Matrix and leads its marketing, business development, sales and customer service teams. Mr.Selimic joined Startec in 2003 leading Startec's marketing efforts in Germany. In 2005, he joined Startec's U.S. marketing team and was responsible for integrating Startec's U.S. and Canadian marketing and sales teams. He was a member of Startec's M&A team responsible for negotiations which resulted in the acquisition by Americatel. Since September 2008, Mr.Selimic has led the consolidation of Americatel and Startec's marketing teams. With 17 years of marketing experience, he has led ethnic marketing efforts in Europe, the United States, Canada and Australia. He has launched products for clients from the Finance, Travel, Telecommunication, Publishing, Consumer goods and other sectors. He was a founding member of the daily newspaper "Vesti", one of the largest ethnic newspapers in the world, distributed in 22 countries across three continents, and the Nidda Verlag Publishing Company and Marketing agency. Prior to joining Americatel, Mr.Selimic was managing Nidda Verlag's Ethnic Advertising Agency and Sales in Frankfurt, Germany.

#### **Micheal Rothchild - Vice President of Network Operations**

As Vice President of Network Operations, Mr. Rothchild is responsible for oversight of Matrix's core switching infrastructure. He joined as a member of the Network Operations team in June of 2006. Since joining Matrix he has been involved in the successful deployment of state of the art switching technology, the optimization of network costs and the streamlining of operational process, which has facilitated a 150% growth in traffic volume. Prior to being with Matrix, Mr. Rothchild joined Mercantel in late 2002. Mercantel was a facilities based wholesale telecom start-up focused on international minutes trading. During his three years with the organization, he and his fellow managing partners worked to attract financial investors. Successfully attracting a growth oriented investment firm, in June of 2006 the organization was rolled into the newly created Excel Telecommunications. Mr Rothchild joined the natural gas trading organization of Dynegy, Inc, in 1997. After less than a year in operations for the commodoties trading division, Mr.Rothchild spent a year in financial forecasting role and a year and a half as a member of a small process re-engineering team. The process team successfully established, documented and oversaw the process changes required to integrate new trading and risk managment systems for the multibillion dollar trading operations. In early 2001 he moved to Dynegy's newly created telecom trading team. Mr. Rothchild graduated from a pilot Entreprenuership program at the University of Houston in 1997 receiving a Bacehlor of Business in Finance.

### David Shifley - Vice President, Technology

Mr. Shifley joined the Matrix team in 2010 as Vice President of Technology after the acquisition of the Excel Telecommunications. Prior to Excel, he held the position of Director of Technology for QuickGifts, an online retailer of gift cards. Mr. Shifley graduated from The University of Texas with a bachelor's degree in Computer Science.