

# Atticus L. Frank, CFA

franka@mercercapital.com

## PROFESSIONAL EXPERIENCE

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Atticus Frank is a senior financial analyst with Mercer Capital. Atticus has valuation experience in engagements related to corporate planning and reorganizations, financial reporting, fairness opinions, litigation support, employee stock ownership plans, and estate and gift tax planning and compliance matters.

As a member of Mercer Capital's Family Business Advisory Services Group, Atticus provides financial education, valuation, and other strategic financial consulting to multi-generation family businesses. The Family Business Advisory Services Group helps family shareholders, boards, and management teams align their perspectives on the financial realities, needs, and opportunities of the business. Additionally, Atticus is a regular contributor to Mercer Capital's blog, *Family Business Director*.

In addition, Atticus spent time at D-R Media and Investments, a diversified media company based in Venice, Florida. Atticus served in the role of CFO, where he oversaw the financial operations of the company, including financial reporting, receivable and payables, and budgeting processes for the company. Atticus also spent time leading Sun Events, a start-up concert promotion business and division of D-R Media. Atticus' responsibilities included overseeing the division's day-to-day operations, budgeting, and marketing strategy. Atticus helped the Sun Events team achieve a near 200% increase in annual revenues during his time, as well as expand ongoing operations across the state of Florida.

## PROFESSIONAL DESIGNATION

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Chartered Financial Analyst (The CFA Institute)

## PROFESSIONAL MEMBERSHIPS

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The CFA Institute

The Financial Consulting Group

## BLOGS & NEWSLETTERS

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*Family Business Director*, Weekly Blog, Mercer Capital

*Value Matters*<sup>™</sup>, Semiannual Publication, Mercer Capital

## PUBLISHED ARTICLES

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“Community Bank Focus How to Combat the Margin Blues?” with Jay D. Wilson, Jr., CFA, ASA, CBA, *Bank Watch*, May 2015

“Non-Compete Agreements at a Sandwich Chain?” *Mercer Capital’s Financial Reporting Blog*, November 7, 2014

## EMPLOYMENT

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Mercer Capital Management, Inc.  
*Senior Financial Analyst, 2021 to present*

D-R Media and Investments LLC  
*President (Sun Events), 2019 to 2020*  
*Chief Financial Officer, 2018 to 2019*

Mercer Capital Management, Inc.  
*Senior Financial Analyst, 2017 to 2018*  
*Financial Analyst, 2014 to 2016*

## EDUCATION

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University of the South, Sewanee, Tennessee (B.A., Economics and Political Science, 2014)

