

Atticus L. Frank, CFA, ABV

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PROFESSIONAL EXPERIENCE

Atticus Frank is a vice president 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 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.

PROFESSIONAL DESIGNATION

Chartered Financial Analyst (The CFA Institute)

Accredited in Business Valuation (The American Institute of Certified Public Accountants)

PROFESSIONAL MEMBERSHIPS

The CFA Institute

The Financial Consulting Group

CFA Society of Tampa Bay

Venice Area Chamber of Commerce

BLOGS & NEWSLETTERS

Family Business Director, Weekly Blog, Mercer Capital

Value Matters[™], Quarterly Publication, Mercer Capital

SPEAKING ENGAGEMENTS

“Advanced Valuation Topics in Gift & Estate Tax,” with Bryce Erickson, ASA, MRICS, *Minnesota Society of CPAs 2021 Business Valuation Virtual Conference*, November 1, 2021

“What Family Business Owners Need to Know About Valuation,” with Travis W. Harms, CFA, CPA/ABV, *2021 Family Business Legacy & Wealth Conference Sponsored by Family Business Magazine*, September 23, 2021

EMPLOYMENT

Mercer Capital Management, Inc.

Vice President, 2022 to present

Senior Financial Analyst, 2021 to 2022

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

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

