

Atticus L. Frank, CFA, ABV

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PROFESSIONAL EXPERIENCE

Atticus Frank is a vice president with Mercer Capital. Atticus has been involved with hundreds of valuation engagements in a diverse range of industries. He provides valuation analyses for gift and estate tax planning, transaction consulting (M&A), corporate planning, and litigation support, among other valuation-related service needs of privately held businesses.

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 DESIGNATIONS

Chartered Financial Analyst (The CFA Institute)

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

PROFESSIONAL MEMBERSHIPS

The CFA Institute

Florida Institute of Certified Public Accountants

Valuation, Forensic Accounting, and Litigation Services Committee

ACG Tampa Bay

CFA Society of Tampa Bay

Venice Area Chamber of Commerce

Venice Estate Planning Council

Greater Sarasota Chamber of Commerce

Southwest Florida Estate Planning Council

COMMUNITY INVOLVEMENT

State College of Florida Foundation

Board of Directors

Charlotte Community Foundation, Inc.

Finance and Audit Committee

Sarasota County School Board

Financial Advisory Committee

BLOGS & NEWSLETTERS

Family Business Director, Weekly Blog, Mercer Capital

Value Matters™, Quarterly Publication, Mercer Capital

SPEAKING ENGAGEMENTS

“2024 Business Valuation Update for Estate Planners,” *Venice Area Estate Planning Council*, Venice, Florida, April 22, 2024

“Are You READY to Increase the Value of Your Family Business?” with Travis W. Harms, CFA, CPA/ABV, *Transitions Spring Conference 2024*, Tampa, Florida, April 18, 2024

“\$80 Billion Update on Business Valuation for Estate Planning,” with Andrew B. Frew, ASA, ABV, Webinar sponsored by the *AICPA*, October 26, 2023

“Who Will Watch the Watchmen? Best Practices Reviewing a Business Appraisal,” *FICPA Mega 2023 Conference*, Orlando, Florida, June 16, 2023

“Is Your Business READY for Sale?” *Venice Area Chamber of Commerce*, Venice, Florida, March 29, 2023

“Guideline Transactions Method and GF Data,” Co-presenter, Webinar sponsored by the *Financial Consulting Group*, February 28, 2023



“Art and Science: A Guide to Business Valuation for Attorneys and Financial Advisors,” *Venice Estate Planning Council*, Venice, Florida, January 23, 2023

“Business Valuation: Through a Glass, Darkly: Challenges and Best Practices Utilizing the Guideline Transaction Method,” *FICPA Valuation, Forensic Accounting & Litigation Services Conference*, Fort Lauderdale, Florida, January 19, 2023

“What Gives? Why Some Companies/Industries Demand Higher Implied Multiples,” Co-presenter, *2022 AICPA & CIMA Forensic & Valuation Services Conference*, Las Vegas, Nevada, November 16, 2022

“Personal Finance Lessons,” *Belize Central Prison Staff Training*, Hattieville, Belize, November 17, 2021

“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)

