

Koby S. Allen

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PROFESSIONAL EXPERIENCE

Koby Allen is a Senior Financial Analyst with Mercer Capital. Koby 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.

He is a member of Mercer Capital's Investment Management Industry team. As a part of the team, he provides content for the *RIA Valuation Insights* blog and newsletter. Koby is also a member of Mercer Capital's Financial Reporting Valuation Group and contributes to Mercer Capital's newsletter, *Financial Reporting Flash*.

PROFESSIONAL DESIGNATION

Successfully completed Level I of the Chartered Financial Analyst exam (The CFA Institute)

BLOGS & NEWSLETTERS

RIA Valuation Insights, Weekly Blog, Mercer Capital

Financial Reporting Flash, Quarterly Publication, Mercer Capital

PUBLISHED ARTICLES / PRESENTATIONS

"Purchase Price Allocations for RIAs," co-author, *Mercer Capital Whitepaper*, 2024

"What to Look for in a Purchase Price Allocation," co-author, *Mercer Capital's Financial Reporting Flash*, November 2024

EMPLOYMENT

Mercer Capital Management, Inc.

Senior Financial Analyst, 2025 to present

Financial Analyst, 2022 to 2025

EDUCATION

University of Memphis, Memphis, Tennessee (B.B.A., Finance and Economics, 2022)