Zachary W. Milam, CFA

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PROFESSIONAL EXPERIENCE

Zachary Milam is a senior financial analyst with Mercer Capital. Zach 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.

In addition, Zach publishes research related to the investment management industry and is a regular contributor to Mercer Capital's blog, *RIA Valuation Insights*.

PROFESSIONAL DESIGNATION

Chartered Financial Analyst (The CFA Institute)

PROFESSIONAL MEMBERSHIPS

The CFA Institute

The Financial Consulting Group

INDUSTRY COVERAGE NEWSLETTERS

Value Focus: Investment Management Industry, Quarterly Publication, Mercer Capital

PUBLISHED ARTICLES

"Valuation of Independent Trust Companies," *Mercer Capital Whitepaper, 2020*

"Posturing Your RIA Firm for a Successful Succession," *Mercer Capital Whitepaper*, 2019

"How to Value a Wealth Management Firm," *Mercer Capital Whitepaper*, 2019

"The Role of Earn-outs in Asset Management M&A," *Mercer Capital Whitepaper*, 2018

SPEAKING ENGAGEMENTS

"What RIAs Need to Know About Current Estate Planning Opportunities," with Brooks Hamner, *Webinar sponsored by Mercer Capital*, October 28, 2020

EMPLOYMENT

Mercer Capital Management, Inc.

Senior Financial Analyst, 2018 to present

Financial Analyst, 2016 to 2018

EDUCATION

University of Alabama, Tuscaloosa, Alabama (B.A., Economics)