

# Jack Carter, CPA

jack.carter@mercercapital.com

## PROFESSIONAL EXPERIENCE

---

Jack Carter is a Senior Financial Analyst with Mercer Capital. Jack specializes in the financial institutions industry, working with banks, thrifts, asset managers, insurance companies and agencies, broker-dealers, and financial technology companies. Jack provides valuation and transaction advisory services, with experience in engagements related to financial reporting, fairness opinions, corporate planning and reorganizations, mergers and acquisitions, portfolio valuation, employee stock ownership plans, and estate and gift tax planning and compliance, among other engagements.

Jack is a member of Mercer Capital's Investment Management team. As a part of the team, he provides content for the *RIA Valuation Insights* blog. He is also part of the firm's Private Equity Industry team and contributes to the *Portfolio Valuation: Private Equity and Credit Newsletter*.

Prior to joining Mercer Capital, Jack was a business valuation senior associate at KPMG, LLP in their financial services industry group.

## PROFESSIONAL DESIGNATIONS

---

Certified Public Accountant (Tennessee State Board of Accountancy)

## PROFESSIONAL MEMBERSHIPS

---

The American Institute of Certified Public Accountants

## BLOGS & NEWSLETTERS

---

*RIA Valuation Insights*, Weekly Blog, Mercer Capital

*Portfolio Valuation: Private Equity and Credit Newsletter*, Quarterly Publication, Mercer Capital

*Bank Watch*, Monthly Publication, Mercer Capital

## PUBLISHED ARTICLES

---

"The Community Bank Scale Tax: Three Questions for Boards in 2026", *Bank Watch*, April 2026

"Public Prices, Private Marks: What BDC Discounts Are Signaling," Co-Author, *Mercer Capital's Portfolio Valuation: Private Equity and Credit Newsletter*, Spring 2026

**EMPLOYMENT**

---

Mercer Capital Management, Inc.

*Senior Financial Analyst, 2025 to present*

KPMG, LLP, New York, NY

*Business Valuation Senior Associate, 2022 to 2025*

*Business Valuation Associate, 2020 to 2022*

**EDUCATION**

---

Vanderbilt University, Nashville, Tennessee (M.A., Accounting, 2020)

University of the South, Sewanee, Tennessee (B.A., Economics, 2019)

