

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)

