Kathryn Burke, CPA, ABV, CFF

burkek@mercercapital.com

PROFESSIONAL EXPERIENCE

Kathryn Burke is a Senior Financial Analyst with Mercer Capital. Kathryn has valuation experience in engagements related to corporate planning and reorganizations, financial reporting, fairness opinions, litigation support, employee stock ownership plans, mergers and acquisitions, and estate and gift tax planning and compliance matters.

She also has forensics and litigation support experience for marital dissolution, economic damages, shareholder disputes, and general litigation. This includes experience in a wide range of industries.

Prior to joining Mercer Capital, Kathryn was a Senior Consultant at FORVIS, LLP in their Forensics and Valuation Services practice. She also contributes to the *Family Law Valuation and Forensic Insights* newsletter.

PROFESSIONAL DESIGNATIONS

Certified Public Accountant (Texas State Board of Accountancy)

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

Certified in Financial Forensics (The American Institute of Certified Public Accountants)

PROFESSIONAL MEMBERSHIPS

The American Institute of Certified Public Accountants

Forensic and Valuation Services Section

SSVS Tactical Tools Task Force

ABV Champion

Texas Society of Certified Public Accountants

Houston Chapter

PUBLICATIONS

Contributing Author, BUSINESS VALUATION 101, Mercer Capital, 2025

SPEAKING ENGAGEMENTS

"Cautionary Tales of Valuation Adjustments and Potential Forensic Implications in Litigation," Co-presenter, *NACVA The Analyst's Edge 2025 Virtual Summit: Future Proofing Business Valuation and Financial Litigation Services,* December 5, 2025

"Personal vs. Enterprise Goodwill in Valuations for Divorce," Co-presenter, *Business Valuation Resources Webinar*, March 27, 2025

PUBLISHED ARTICLES

"A Financial Perspective and Overview of Marital vs. Separate Property in Divorce, Part 3: Illustrative Examples," Co-Author, Mercer Capital's *Family Law Valuation and Forensics Insights,* September 2026

"A Financial Perspective and Overview of Marital vs. Separate Property in Divorce, Part 2: Valuation, Financial, and Forensic Considerations," Co-Author, Mercer Capital's *Family Law Valuation and Forensics Insights,* August 2026

"A Financial Perspective and Overview of Marital vs. Separate Property in Divorce, Part 1: Property Classification," Mercer Capital's *Family Law Valuation and Forensics Insights,* July 2026

"Digital Assets and Divorce," Mercer Capital's *Family Law Valuation and Forensics Insights,* January 2026

"Understanding the Company Specific Risk Premium – A Component of the Discount Rate," Mercer Capital's *Family Law Valuation and Forensics Insights,* August 2025

EMPLOYMENT

Mercer Capital Management, Inc.

Senior Financial Analyst, 2024 to present

FORVIS, LLP (formerly BKD)

Senior Consultant, 2024

Consultant, 2022-2024

Student Associate, 2019-2021

EDUCATION

University of Texas, San Antonio, Texas, (M.A., Accounting, 2021)

University of Texas, San Antonio, Texas, (B.B.A., Accounting, 2020)