



CARRIE GELDREICH

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[VCARD](#) | [LINKEDIN](#)

Carrie counsels clients on strategic planning, financial planning and analysis, exit strategy development, and acquisition planning and execution. She works with clients from start up businesses to large corporations utilizing her strong analytical skills.

Carrie began her career in public accounting and then spent several years working for a Fortune 500 information technology company where she led an analysis of the company's pension funding and balance sheet strategy. She also modeled and managed several acquisitions for the company's global services division. During her career, she has led annual planning and financial analysis for a consumer electronics company during a period of explosive growth and held senior and executive positions for a large healthcare distributor. In that role, she managed due diligence and acquisition modeling for transactions from 20 million to over a billion dollars. She also led the company's annual, long range, and sales and commission planning.

FUNCTION & SPECIALIZATION

- Valuation modeling
- Financial planning and analysis
- Cash flow analysis and forecasting
- Mergers and acquisitions support
- Revenue recognition analysis

REPRESENTATIVE CLIENTS & PAST EXPERIENCES

- Enfield Timber
- ERISA Services
- Owens and Minor
- Dodson Properties
- Kaleo
- Sandpiper
- PieTech
- INProduction/Dubin Clark
- Brink's
- McKesson
- IBM
- Circuit City
- BDO Seidman

EDUCATION, LICENSES & CERTIFICATIONS

- MBA, Corporate Finance, UNC Kenan-Flagler Business School
- B.B.A., Accounting, William & Mary
- CPA (inactive)

PROFESSIONAL ASSOCIATIONS & COMMUNITY ORGANIZATIONS

- Connor's Heroes Foundation, board of directors
- Collegiate School, service learning committee chairman
- Collegiate School, admissions tour guide
- UNC Kenan-Flagler Business School, MBA Student Association (former vice president "finance")
- UNC Kenan-Flagler Business School (former peer counselor)