



BRAD HARGER

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

Brad brings over 15 years of extensive experience in equity research and financial sponsors showcasing a deep understanding of finance across an array of industries. His commitment to enhancing client comprehension of strategic goals, competitive positioning, and financial visibility reflects a dedication to delivering tailored value to each client, regardless of industry or business size. This skill is especially crucial given the diverse and unique needs of clients, highlighting his ability to customize insights and recommendations accordingly. Moreover, his proficiency in Microsoft Excel Power BI, Oracle Hyperion, and NetSuite underscores a robust technical skill set, essential for efficient financial analysis and reporting in the ever-evolving financial landscape.

Brad began his career working as a sell-side equity research associate focusing on the retail, restaurant, grocery, and food service industries. He then transitioned to investment banking / M&A at a Fortune 500 bank where he worked with private equity firms and strategic buyers to conduct financial due diligence, identify acquisition targets, write investment memoranda, and deliver management presentations for buy and sell-side transactions of middle-market private and public companies. During his career, Brad has amassed financial modeling experience including LBO, accretion / dilution, merger model, DCF, three statement model, among others.

FUNCTION & SPECIALIZATION

- Investment banking and M&A
- Financial planning and analysis
- Key performance indicators and trend analysis
- Financial /management consulting and implementation
- Financial model development and benchmarking

REPRESENTATIVE CLIENTS & PAST EXPERIENCES

- Journey Health & Wellness LLC.
- Credo Fresh
- Hello Groundwork
- Produce Source Partners
- Truist Financial
- Westfield Insurance
- KeyBanc Capital Markets
- Cleveland Research Company

EDUCATION, LICENSES & CERTIFICATIONS

- M.B.A., Finance, Virginia Commonwealth University
- M.B.A., Business Administration, Case Western Reserve University (partial-relocated)
- B.A., Business Administration, Malone University