



## BRAD HARGER

Director

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

Brad brings over 15 years of experience in financial planning and analysis, financial sponsors, and investment banking with a focus on helping clients achieve their strategic goals. He began his career as a sell-side equity research associate specializing in the retail, restaurant, grocery, and food service industries before transitioning to investment banking with a Fortune 500 firm. There Brad collaborated with private equity firms and strategic buyers on financial due diligence, acquisition target identification, and middle-market transactions showcasing his expertise in competitive positioning and operational opportunities.

With advanced financial modeling skills (LBO, DCF, and merger models) and proficiency in tools like Excel, Power BI, Oracle Hyperion, and NetSuite, Brad excels at delivering actionable insights. His commitment to tailored, value-driven solutions and his ability to adapt to evolving client needs solidify his reputation as a trusted financial partner across an array of industries.

### 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.
- ReAlta Life Sciences
- 0704 Capital
- AOTCO
- Compliance Elite
- First Tee of Richmond
- Longwood University
- TalentCare
- TemperPack
- Tigeraire
- Weinstein Jewish Community Center
- 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