
Mahesh Rao, CEPA®, CFA®

Business Owner Advisory Strategist
Central and Southeast Divisions



550 S Tryon St, 45th floor
Charlotte, NC 28202-4200
Office: 704-374-2976
mahesh.rao@wellsfargo.com

Mahesh Rao is a business owner advisory strategist with Wealth & Investment Management for the Southeast division Markets and Texas, Oklahoma, and New Mexico in the Central division. Mahesh is part of a national team dedicated to advising and help prepare business owners for a successful ownership transition through comprehensive evaluation of their available options. Mahesh offers in-depth insight and advice to high and ultra-high net worth families, as well as family offices.

Prior to joining his current role, Mahesh worked at Wells Fargo Business Sales and Advisory for 10 years, where he was a Managing Director. He has been in the financial services industry for more than 23 years, including Wells Fargo Corporate and Investment Bank and Closely Held Asset Management.

Mahesh earned a Master of Business Administration from Duke University's Fuqua School of Business, as well as undergraduate and graduate degrees in Aerospace Engineering from North Carolina State University. Mahesh has been awarded the Certified Exit Planning Advisor (CEPA) designation, the Chartered Financial Analyst (CFA) designation, and is a member of the CFA Institute and the CFA Society of North Carolina..

He resides in Charlotte, North Carolina where he enjoys spending time with his wife and two daughters who share his love of travel.

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