

## Mahesh Rao, CEPA<sup>®</sup>, CFA<sup>®</sup>

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With over 20 years of financial advisory experience, Mahesh Rao is a business owner advisory strategist with Wells Fargo. Mahesh is part of a national Business Owner Advisory team dedicated to advising and preparing business owners for a successful ownership transition through comprehensive evaluation of their available options. Mahesh offers in-depth insight and advice based on his 13 years of investment banking experience.

Mahesh spent 4 years in business valuation and management of closely-held business interests in trusts and estates. He then spent time in Wells Fargo's Corporate and Investment Bank, and later in Business Sales & Advisory, where he was a managing director responsible for helping business owners sell their privately held companies.

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 N.C. 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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