Keith Carlson



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Professional Experience

Keith Carlson is a seasoned investment banker with an impressive track record spanning over two decades in the field of mergers and acquisitions (M&A). With a wealth of experience, Keith has successfully closed over 150 transactions, showcasing his expertise as both a direct investor and an advisor.

Throughout his career, Keith has demonstrated his proficiency in managing deals of various sizes, ranging from $500,000 to $20 billion. The majority of his 150+ closed deals are recognized as lower middle market transactions, highlighting his versatility and effectiveness in navigating diverse market segments.

Keith's unique strength lies in his dual role as a direct investor, involved in acquiring businesses, and as a seller, providing advisory services for the sale of businesses. This comprehensive perspective equips him with an in-depth understanding of the intricacies involved in closing a transaction successfully.

His skill set encompasses a wide range of areas critical to M&A, including deal structuring, positioning, transaction consequences, risk mitigation, negotiations, due diligence, financial analytics, valuation, and financial modeling. Keith's ability to navigate these complex aspects with precision and strategic insight sets him apart in the competitive landscape of investment banking.

With a proven track record of delivering results, Keith Carlson stands as a trusted professional in the M&A industry. His dedication to excellence and holistic approach to transactions make him a go-to expert for clients seeking a complete and reliable perspective to guide them through the intricacies of the deal-making process.

Professional Activities

- University of Kentucky Finance Advisory Board
- St. Elizabeth Foundation – Young Patrons Guild

- A Greater Cincinnati – Founding Member
- Northern Kentucky Chamber of Commerce – Emerging 30

Community Involvement

- Life Learning Center
- American Heart Association
- Lion’s Club – Fort Thomas, KY

Education

- Bachelor of Science in Finance, University of Kentucky, Lexington, KY

Contact

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