

PATRICK TERRY



CPA

Principal, Data Analytics Practice Leader

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678.510.2779

EDUCATION

Kennesaw State University,
Bachelor of Science in Business
Administration Degree in
Accounting and Finance

CERTIFICATIONS

Certified Public Accountant, GA
AICPA Certified Data Analyst

EXPERIENCE

Patrick leads the firm's data analytics team where he uses a seamless approach to help companies and their owners over the life of the entity. With deep experience serving various industries, he excels at anticipating an entity's needs and then draws from the vast knowledge base of the Windham Brannon team to assist in areas like fractional CFO services, state and local taxes, tax planning and transaction support.

Over his more than 30-year career, Patrick has built professional leadership experience in public accounting with international, regional and local firms. He has worked extensively with closely-held companies, not-for-profit and venture/private equity-backed entities. His specialty areas include audit and review, data analytics, mergers and acquisitions and due diligence. In addition to technology companies, he has worked with companies in the financial services, not-for-profit, real estate, manufacturing and distribution and professional services sectors to develop out his well-rounded business experience.

He is an AICPA Certified Data Analyst and has completed the Data Analytics Core Concepts Certificate, Application of Data Analysis Essentials Certificate, Data Analytics Modeling Certificate, Forecasting and Predictive Analytics Certificate and the Data Visualization Certificate.

Specialties:

- Data Analytics
- Assurance
- Technology
- Manufacturing & Distribution
- Not for Profit
- Professional Services

PROFESSIONAL ASSOCIATIONS

- American Society of Certified Public Accountants, Member
- Georgia Society of Certified Public Accountants, Member
- MIT Forum, Member
- Technology Association of Georgia, Member
- Atlanta Technology Village, Advisor
- Kennesaw State University School of Accounting, Advisory Board and Strategic Planning Committee



PUBLICATIONS & THOUGHT LEADERSHIP

- Investors Pull Back the Reins on Funding Tech Startups
- Pandemic Pivot Case Study: An Entrepreneurial Music Company Goes Digital

PRESENTATIONS

- Using Data Analytics to Enhance Financial Management, Reporting and Decisions, Insights, 2022