

Role Description

Associate – Corporate Finance Practice

Chartwell's corporate finance practice provides independent, solutions-based advice and investment banking services to shareholders, boards of directors, and management teams to optimize our clients' objectives. Our professionals have substantial expertise in mergers and acquisitions, capital markets, and strategic alternatives. The Chartwell team is recognized throughout the industry for providing high-quality, relationship-based advice to clients, and has executed hundreds of transactions across all industry sectors throughout the U.S. and internationally.

Essential Role Activities

The associate role provides an opportunity for a motivated professional to be a key player in the execution of corporate finance mandates while gaining significant experience from a talented, dedicated staff of professionals. As an associate you will:

- Participate in the full cycle of transaction execution:
 - Undertake due diligence with clients, reviewing and formulating financial analyses
 - Develop company valuations and analyzing various transaction structures
 - Prepare company presentations, including pitch materials and confidential information presentations
 - Oversee day-to-day management of the project and build relationships with the client and other professionals
- Play a leadership role in the team working with analysts and reviewing the accuracy of work, along with assisting senior professionals who will give you broad exposure to a wide range of industries and complex transactions
- Be given substantial responsibility to work on multiple engagements with team members across the firm and opportunities to develop into a senior professional capable of generating and executing their own transactions

Basic Qualifications

The associate role requires a wide variety of strengths and capabilities, and a successful candidate will possess the following characteristics:

- Strong academic background with focus in finance, economics, or accounting
- Three to five years of relevant work experience in investment banking, cash flow lending, leverage finance, private equity, accounting, corporate consulting, equity research, or other relevant industries
- Strong analytical abilities and deep knowledge of accounting and corporate finance theories
- Advanced experience in Excel with financial and cash flow modeling
- Fundamental understanding of valuation theory, methodologies, and applications
- Excellent verbal and written communication skills, including the ability to communicate effectively with clients and develop compelling business presentations in PowerPoint
- Acute attention to detail and a dedication to providing high-quality work products
- Highly motivated with the ability to learn and problem solve in a fast-paced environment
- Strong work ethic, organizational skills, and ability to multitask

For additional information about this position, please contact [Diane Riley](#), Human Resources Director.