



Analyst: Compensation Practice

Chartwell is a close-knit financial advisory firm where a high degree of intellectual curiosity, dedication to continuous improvement, and the ability to work in a team environment are critical for success. We strive to attract team members from a wide range of backgrounds and empower them in an inclusive and supportive environment. We believe this is crucial for attaining professional goals, delivering the best work for our clients, and developing enduring relationships. We conduct business in an honest, ethical manner, and treat everyone with the highest level of respect, integrity, and professional courtesy.

The primary focus of this position is project execution within Chartwell's compensation practice, with opportunity for further advancement. This position will afford an opportunity to develop a solid working knowledge surrounding compensation design principles, the taxation of various forms of compensation, and ERISA and Employee Stock Ownership Plans ("ESOPs").

Although no experience is required for this position, priority will be given to candidates with experience in a consulting background, and ideally experience in a tax/technical compensation practice role in a national public accounting firm. The candidate must exhibit an intellectual curiosity and ability to grasp tax/technical concepts and compensation design principles. Given the opportunity and expectation of advancement into a future project management role, the candidate also needs excellent written and verbal communication skills.

The compensation practice works exclusively with privately held companies, with a special emphasis on companies that sponsor ESOPs. The practice is currently embedded within Chartwell's broader consulting group. Core services within the compensation practice include: advising on the development of compensation philosophies considering a company's broader strategic goals and ownership philosophies; benchmarking executive compensation; designing and modeling annual incentive plans; designing and modeling mid-term and long-term incentive plans; incorporating incentive plan designs into financial models to gauge impacts on all stakeholders.

The analyst will be responsible for core project execution functions, including benchmarking compensation, preparing models to evaluate incentive design outcomes, writing client reports and presentations, and communicating effectively with Chartwell leadership on project status. In addition, the analyst may be involved in various business development activities including proposal development and prospect company research. This position will report to the leader of the compensation practice and will have the opportunity to work closely with other project teams and senior leaders of the firm on integrated projects where compensation is part of a larger project. Integrated projects normally involve some element of ownership advisory, corporate or ESOP sustainability, or new ESOP implementations.

This level of engagement results in a tremendous opportunity to interact with Chartwell professionals at the highest levels of the organization as well as C-suite executives of our client firms.

Essential Role Activities

As an analyst in the compensation practice, you will:

- Perform project execution duties
 - Review and summarize client compensation programs
 - Benchmark compensation
 - Model annual, mid- and long-term incentive plans
 - Organize and write client reports summarizing results and fundings
 - Communicate with Chartwell project managers regarding project status and needs
 - Participate in client presentations
- Consult on technical matters regarding compensation design and taxation (e.g., Sections 83, 409A, 421, 422, 423)
 - Exhibit an intellectual curiosity to grow in your technical knowledge
 - Work with senior leaders to consult regarding tax/technical matters



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- Support firmwide efforts
 - Work on engagements with team members across the consulting practice and in some cases, across the firm
 - Participate in client presentations where multiple service lines are presented as a comprehensive solution
 - Opportunity to advance and develop as a leader within the firm

Basic Qualifications

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

- 4-year undergraduate degree in economics, data analytics, mathematics, business, or accounting
- 1-2 years of experience in a consulting or tax/technical background is preferred
- Strong analytical abilities
- Excellent verbal and written communication skills
- Acute attention to detail and a dedication to providing high quality work products
- Experience in Microsoft Excel and PowerPoint
- Highly motivated with the ability to learn and problem solve in a fast-paced environment
- Strong work ethic, organizational skills, and ability to work on concurrent projects is crucial
- Desire for continual learning and the development of new skills to support Chartwell growth

Questions? Contact HR Director Diane Riley: diane.riley@chartwellfa.com