



Associate: 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 to manage projects and provide oversight to junior staff within Chartwell's compensation practice, with opportunity for further advancement. This position requires the candidate to possess a solid working knowledge of compensation design principles, the taxation of various forms of compensation, and ideally ERISA and Employee Stock Ownership Plans ("ESOPs").

The candidate must have a consulting background, and the ideal candidate will have experience in a tax/technical compensation practice role in a national public accounting firm. Most importantly, the candidate must be able to apply this knowledge readily when consulting with clients using excellent written and verbal communication skills, as project management is a key expectation for this role.

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 associate will be responsible for the daily management of project types as outlined above, communicating with clients, and assisting in development of new staff. In addition, the associate 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 with 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 associate in the compensation practice, you will:

- Manage client projects workflow
 - Communicate with clients regarding project timelines and data needs
 - Participate in client presentations
 - Serve as the first reviewer of work product to ensure high quality deliverables and client suitability
 - Provide direction to junior team members for completing projects and deliverables
- 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
 - Assist in coordinating with client legal counsel drafting plan documents
- 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



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Basic Qualifications

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

- 4-6 years of experience in compensation benchmarking and design
- Consulting background is required
- Tax/technical background in a compensation practice of a national public accounting firm is strongly preferred
- Relevant ESOP experience strongly preferred
- Solid understanding of compensation design principles and the taxation of various forms of compensation
- Strong analytical abilities and knowledge of accounting and finance principles
- Understanding of complex financial and cash flow modeling and analysis
- Excellent verbal and written communication skills, including the ability to effectively communicate with clients
- 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

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