FP TRANSITIONS®

Title:	Financial Analysis/Valuation Consultant
Classification:	Full-time exempt; Onsite, Hybrid Available
Department:	Financial Analysis
Reports to:	Director of Valuations

Objective: Seeking a highly organized consultant to collaborate with clients to evaluate the impacts of historical, current, and projected cash flows, demonstrating proficiency in technology and a willingness to contribute to a dynamic and tight-knit team.

FP Transitions Introduction: At FP Transitions, our team helps wealth advisory firms identify, build, and realize value. We value innovation, collaboration, client-centricity, and objectivity. We are entrusted with mission-critical moments and drive life-altering business decisions.

Role Summary: This role is central to FP Transitions' mission to allow clients to focus on the decisions that drive value. A Financial Analyst has a working knowledge of general finance topics such as business capital structures, accounting, economics, mergers and acquisitions, and statistics. This person works directly with clients to collect relevant information to assess the business' historical, current, and estimated future cash flows based on the products sold and services provided. The work performed by the analyst is supported through peer review as well as guidance and feedback from other team members. As a contributor to our integrated consulting engagements, this person must be able to adapt their approach (both personally and professionally) to clients' strategy and business scenario. The Financial Analyst must be highly organized, technologically adept, professional, and willing to fill various needs within a fast-paced growing department.

Essential Functions:

- Create financial models to illustrate equity transactions, business mergers and acquisitions, compensation designs, and related topics for real-world deals.
- Contribute expertise to valuation model development and improvement.
- Review finished valuation reports to ensure quality standards are met.
- Review and analyze confidential financial information for a client's business to arrive at an informed, professional opinion of value.
- Follow company protocol for project management and client data entry, record client information in the CRM database and file server as directed.
- Generate valuation reports, in conjunction with our in-house appraisers, according to company standards and modify report structure as required to fit comprehensive client engagement.

- Interface with clients to explain and draw insights from financial models.
- Contribute to overall consulting engagements by gaining a comprehensive understanding of succession planning, mergers & acquisitions, and other business transaction strategies within the regulatory and structural framework of independent financial practices.

Required knowledge, skills, and abilities:

- Financial analysis: skilled in various valuation methodologies, familiar with reviewing financial statements (e.g., profit and loss statements, tax returns), and able to recast financial information appropriately to support valuation analysis.
- Communication skills: professional report writing, research, and client communication; reads and replies to emails in a timely manner, speaks clearly and effectively; public speaking and presentation skills are preferred.
- Advanced knowledge of Microsoft Office Suite: Word, Excel, PowerPoint, Outlook, Teams.
- Familiar with Salesforce CRM or a similar relational database.
- Research and reporting skills.
- Time management
- Self-organized and self-motivated.
- Strong attention to detail, especially when reviewing financial information, entering data, or writing client communication.

Education and Experience:

- 2+ years of experience in financial or market analysis is strongly preferred
- Bachelor's degree in accounting, finance, or a related area is preferred
- Professional credentials preferred (e.g., CVA, CFA, ABV)
- Experience in the wealth management/financial services industry is preferred

Compensation and Benefits:

- Salary $75,000.00 to $90,000.00 DOE
- Medical, Vision, Dental, 401k with 25% employer match
- Company lunches, snacks, team-building events
- Company holidays (including employee's birthday) and accrued PTO.

Physical factors and working conditions:

- Professional office environment, on-site (hybrid available as approved by manager), minimal travel required.