



**Title:** Consultant - Mergers & Acquisitions  
**Classification:** Full-time exempt; Onsite  
**Department:** Mergers & Acquisitions (M&A)  
**Reports to:** VP of M&A

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**Objective:** Serve as a consultative guide by helping clients navigate the landscape of mergers and acquisitions and evaluate the best path and partner for themselves, their staff, and their firm's clients.

**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:** The M&A Consultants act as consultative guides and manage the process to help clients navigate the M&A landscape and evaluate the best path and partner for themselves, their staff, and their firm's clients. M&A Consultants act as the proverbial quarterback to ensure the expedient and successful completion of the desired transaction. Each M&A Consultant has a caseload of roughly 15-20 transactions at a time.

M&A Consultants must be excellent communicators with clients and company leadership. M&A Consultants must anticipate the needs and deliver consultative guidance and tactical support to complete transactions. While this person works closely with their team and leverages support from other teams, they are expected to work independently with minimal supervision and to communicate proactively should any issues arise.

**Essential Functions:**

- **Consulting:** Give expert guidance and strategic advice to clients seeking to complete a transaction.
- **Project Management:** Manage multiple transactions concurrently and independently, ensuring milestones are met and deliverables are produced with exceptional quality.
- **Data Collection:** Assist with collecting and organizing relevant data from clients, ensuring accuracy and completeness.



- Maintain accuracy: Ensuring records of client interactions, project status, and relevant data are completed and generating periodic reports as required from the customer relationship management (CRM) software.
- Client Relationship Management: Cultivate strong, trust-based relationships with clients. Understand their unique business needs, maintain regular communication, and provide ongoing support and advice.
- Problem Solving: Identify and address potential issues or roadblocks that may arise during the client's journey, working proactively to find solutions. Report on the status of projects to your department head as requested.
- Industry Knowledge Sharing: Stay updated on industry trends, best practices, and emerging technologies. Share insights with clients to ensure their businesses remain competitive and innovative.

#### Preferred knowledge, skills, and abilities:

- Solid computer skills, including MS Office and ability to use Excel & PowerPoint
- Experience with tech platforms such as Salesforce, HubSpot, Tableau, and Better Proposals is preferred.
- Well-organized and detail-oriented.
- Project management experience preferred.
- Exceptional communication and writing skills, maintaining strict confidentiality when appropriate.
- Exceptional time-management and organizational skills.
- Analytical, strategic, and creative problem-solving skills.

#### Education and Experience:

- 3-5 years of experience as a consultant, attorney, investment banker, analyst, business intermediary, or related field.
- Advanced degree or credentials preferred (e.g., JD, MBA, CBI, or CFA)
- Experience in the wealth management/financial services industry is strongly preferred.
- Proven experience in project coordination or management, with a track record of successfully delivering projects on time and within scope.



### Compensation and Benefits:

- A base of \$75,000.00 to \$90,000.00 + incentive compensation DOE.
- Company lunches, snacks, team-building events
- Medical, Vision, Dental, 401k with 25% employer match.
- 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.

