Private Institutional Clients Associate I

Job Summary

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Under administrative direction, uses extensive knowledge and skills obtained through education and experience to work with a variety of financial products, including public and private debt and equity financings, referral agreements, approval memos, deal calendars and other financial advisory needs. The Associate will contribute and generate ideas during the entire transaction process. Works independently on difficult assignments that are broad in nature requiring originality and ingenuity with appreciable latitude for un-reviewed actions or decisions. Leads large multiple projects with significant scope and impact.

Essential Duties and Responsibilities

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- Maintains responsibility for financial models to assess debt and equity financing alternatives for transactions.
- Performs valuation methodologies comparative company analysis and discounted cash flow analysis on target companies.
- Leads an entire transaction process from start to finish, including with sponsor management and presenting to internal approval committees comprised of senior executives.
- Researches, analyzes, presents and documents drafting elements of a developing transaction.
- Develops client presentations.
- Follows general current events in respective industries and keep colleagues informed about critical issues in the news relevant to current and potential clients.
- Oversees databases related to active and prospective deals.
- Provide management support to analysts through training, mentoring and evaluating performance potential.
- Performs other duties and responsibilities as assigned.

Knowledge, Skills, and Abilities

Knowledge of

- Fundamental concepts, practices and procedures of PIC deal flow.
- Fundamental investment concepts, practices and procedures used in the securities industry.
- Financial markets and products.

Skill in

- Communicate effectively, both orally and in writing.
- Analytical skills sufficient to assess and explain events in the market.
- Problem solving skills and the ability to think independently sufficient to market ideas.
- Operating standard office equipment and using required software applications, including Microsoft Office and established databases.

Ability to

- Gather information, identify linkages and trends and apply findings to reports.
- Attend to detail while maintaining a big picture orientation.
- Remain cognizant of our commitment to daily workflow and regulatory compliance during high volume activity.
- Organize, manage and track multiple detailed tasks and assignments with frequently changing priorities in a fast-paced work environment.
- Establish and maintain effective working relationships at all levels of the organization.
- Work independently as well as collaboratively within a team environment.
- Assume full responsibility and accountability for own actions.
- Demonstrate uncompromising adherence to ethical principles.
- Be proactive and demonstrate readiness and ability to initiate action.

Educational/Previous Experience Requirements

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- Bachelor's Degree (B.A.) in related field and a minimum of 2-3 years of experience in a capital markets field.
- Advanced degree and/or charter(s) preferred (e.g. MBA, CFA, CAIA, etc.)

OR ~

- Any equivalent combination of experience (2-3 years of Investment Banking or similar), education, and/or training as approved by Human Resources.

Licenses/Certifications

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- None required.

Travel

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Travel Required: Yes, up to 50 % of the Time