

Job Description

Senior Analyst – Valuation Practice

The primary focus of the associate position is to assist senior team members with valuation project execution. Specific valuation experience should include:

- Complex securities
- Financial reporting (409A, ASC 718, ASC 350, etc.)
- Monte Carlo simulations
- Binomial lattice modeling

Duties include historical and pro forma client company analysis, public company and merger and acquisition analysis, report writing and editing, due diligence review of client information, communication and clarification with clients, and participation in management interviews with clients and other advisors. While it is anticipated that the majority of efforts will be applied to execution of client projects, certain business development activities will also be required.

This position requires a deep understanding of business valuation and corporate finance theory and a detailed working knowledge and expertise with Chartwell's financial models.

The primary focus of this position includes:

- Acting as the primary client contact with respect to client engagements and closely working with senior team members to ensure effective client communication
- Assisting with analyst training and development as appropriate
- Expanding professional relationships
- Continual enhancements of analytical, technical, and communication skills

Chartwell is a closely connected professional 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 conduct business in an honest, ethical manner and treat everyone with the highest level of respect, integrity, and professional courtesy. We believe providing quality service to our clients will develop enduring relationships and ensure our long-term success. We support an environment where every team member is empowered to attain their professional goals.

Essential Job Qualifications

- Refine understanding of the valuation process, methodologies, and analytical models
- Coordinate analysts' work efforts to ensure timely execution of client deliverables
- Write, review, and edit client reports
- Assist in managing client relationships
- Development of staff skills to support Chartwell growth
- Work independently on multiple projects with multiple team members while managing varied responsibilities

Basic Qualifications

- 4-year undergraduate degree
- 2+ years relevant valuation experience
- CPA, ASA, ABV, CFA or other relevant professional credentials preferred
- Strong verbal and written communication skills
- Advanced experience in MS Excel, Word, and PowerPoint
- Acute attention to detail and a dedication to providing high quality work products
- Willingness to work hard with a positive attitude
- Experience in handling sensitive/confidential information
- Self-motivated and ability to problem solve
- Strong project and time management skills

For additional information about this position, please contact contact [Maria Palacios](#), Recruiting Coordinator.