



Job Title: Consulting Manager
Department: Consulting
Reports to: Consulting Leadership
Level: Full time, Exempt
Updated: July 2022

Summary of Responsibilities:

The position will oversee and manage a team involved in Business Valuations, Mergers and Acquisitions Due Diligence, Quality of Earnings Analysis, Litigation Support, Fraud and Forensic Engagements. The candidate will work with consultants to determine strategy for engagements. The ideal candidate will have a background in finance and/or accounting with 5-7 years of experience. Prior experience in assurance is a plus, but not a requirement. This is a dynamic role with tremendous opportunity to learn and grow.

Essential Functions:

- Manage financial analysis for transactions and/or projects.
- Manage and be involved with the preparation of Valuation and Due Diligence Analysis Reports utilizing PowerPoint.
- Manage and perform M&A Due Diligence and Quality of Earnings Analysis engagements including oversight of timelines and planning of these engagements.
- Create and populate excel models with financial data for purposes of analysis.
- Participate and lead client/target calls and meetings throughout the entirety of a project.
- Prioritize and manage multiple projects simultaneously and follow through on issues in a timely manner.
- Draft and / or review project memorandums as needed for client and or consulting team.
- Provide support services as needed for closing of engagements.
- Coordinate with Consulting Leadership Team to determine client needs and complete applicable projects.
- Learn the “People” needs of a client’s organization, operating with consultative approach, building the relationship with appropriate client contacts.
- Other duties, as assigned.

Education, Experience, and Skills:

- Bachelor’s degree in Finance or Accounting is required.
- Willingness to obtain a valuation or valuation-related credential(s).
- 5-7 years’ experience in Finance or Accounting role preferred.
- Prior assurance experience is a plus, but not a requirement.
- Strong interest in equity markets.
- Strong organizational and multi-tasking skills.
- Strong analytical and technical skills.

- Possess an understanding of business drivers and the implications involved in cautious client solutions.
- Excellent written, proofreading, and verbal communication skills.
- Advanced skill level working with Microsoft Power Point, Word, Excel and Outlook.
- Ability and desire to perform Internet research on multiple topics.
- Must be comfortable interacting with professionals at all levels, internally and externally.
- Must be able to function effectively with multiple team members, set priorities and meet deadlines.

Expectations:

- Dependable and flexible with work schedule demands.
- Respect and earn the respect of fellow team members.
- Take ownership of identified processes and responsibilities.
- Keep open communications with other teammates and partners.
- Perform work with confidence and pride, follow through to completion.
- Work independently and make informed decisions. Discuss with manager when needed.
- Self-motivated.
- Work in a safe, clean and employee friendly atmosphere.

Working Conditions:

- Ability to be seated for long periods of time – office desk environment.
- Occasional heavy lifting.
- Minimal hazards.
- General office working conditions.
- Travel as required.

The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this job. It is not intended to be an exhaustive list of all duties and responsibilities required of individuals in this job. Other duties may be assigned as determined by management. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities of this job.

We are committed to providing equal employment opportunities to all employees and applicants without regard to race, ethnicity, religion, color, sex (including childbirth, nursing and related medical conditions), gender, gender identity or expression, sexual orientation, national origin, ancestry, citizenship status, uniform service member and veteran status, marital status, pregnancy, age, protected medical condition, genetic information, disability, or any other protected status in accordance with all applicable federal, state and local laws.

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