

Carl Marks Advisors

Investment Banking Associate

Carl Marks Advisors is a nationally recognized investment banking and consulting firm. Headquartered in New York City, Carl Marks Advisors helps middle-market business owners, lenders, investors, and their advisors resolve investment banking and turnaround challenges and specializes in working through complex situations bringing every engagement to a successful close.

For businesses and investors seeking growth opportunities, or the means to maximize value, Carl Marks Advisors provides a full range of investment banking solutions that include identifying strategic opportunities to financing options and creating value through divestiture or a recapitalization.

Carl Marks Advisors' consulting team specializes in driving performance improvements within organizations confronted by challenges by increasing enterprise value through strategic repositioning, business portfolio adjustment, structural improvement, increasing efficiency through cost reduction, and revenue enhancement.

Job Summary

The Associate will work directly with the investment banking team on current and prospective engagements. Directly responsible for drafting offering memoranda and other marketing materials, performing company valuations, developing integrated financial models, managing the flow of data associated with all client engagements, and conducting due diligence. Client services may include: M&A, capital raises, restructuring, etc. Duties may be carried out in the New York office or onsite at the client.

Essential Functions

- Work closely with senior professionals to compile financial information
- Participate in transactions from origination to closing including valuation analysis, complex financial modeling, conducting due diligence and other processes
- Conduct detailed financial statement and valuation analyses and participate in development of detailed financial models; company and industry research
- Draft and prepare pitch books, reports, descriptive memoranda, and oral presentations
- Interact with clients, potential investors, attorneys and others as required
- Maintain records, files and data related to client engagement activities
- Respond to requests for data, research, analyses, etc. as needed
- Perform additional duties as required

Job Qualifications:

- Excellent oral and written communication skills
- Ability to work under deadlines, prioritize and multi-task
- Team player and self-starter with exhibited initiative and drive
- Strong quantitative and technical skills
- Accuracy, thoroughness, and attention to detail in aspects of work product
- Appropriately handle confidential and sensitive information
- Strong proficiency in MS Office, particularly with advanced functions in Excel
- BA or BS degree in finance or accounting; 3.5+ GPA preferred
- Experienced 2nd or 3rd year Associate with investment banking or M&A experience from major or boutique investment banks with high deal flow
- No relocation provided. Local candidates with direct experience will be given preference

Send cover letter AND resume to careers@carlmarks.com