



Title: Valuation Analyst
Classification: Full-time exempt, permanent hire
Department: Valuation
Reports to: Ryan Grau, VP of Valuation Services

Objective:

The Valuation Analyst is a subject matter expert who uses their knowledge and collaboration skills to enable clients to understand business what creates value focus on the decisions that drive value.

Summary:

This role is central to FP Transitions' mission to allow clients to focus on the decisions that drive value. The Valuation Analysts works directly with clients to explain the valuation discipline and provide a written, informed, professional opinion of value. This role also coordinates with various consulting specialists as the subject matter expert in business valuation. As a contributor to complex, integrated strategic consulting engagements, this person must be able to adapt their approach (both personally and professionally) to clients' strategy and business scenario. The valuation coordinator must be highly organized, technologically adept, and professional.

Essential Functions:

- Review and analyze confidential financial information for clients' business in order to arrive at an informed, professional opinion of value.
- Educate clients on valuation approaches and methodologies as appropriate for their valuation need using phone, email, or video conferencing.
- Follow company protocol for project management and client data entry, record client information as required in database and file server.
- Write valuation reports according to company standards, modify report structure as required to fit comprehensive client engagement.
- Contribute to overall consulting engagements by gaining a comprehensive understanding of succession planning, mergers & acquisitions, and other business transaction strategies within the regulatory and structural framework of independent financial practices.

Required Knowledge, Skills, and Abilities:

- Financial analysis: highly skilled in valuation approaches, e.g., market-based, most probable selling price, and discounted cash flow valuations; can explain and defend opinion of value in writing; expert witness testimony is beneficial but not required;



familiar with reviewing financial statements (e.g. profit and loss statements, tax returns) and able to restate financial information as appropriate to support valuation analysis.

- Communication skills: professional report writing, research, client communication; reads and replies to emails in a timely manner, speaks clearly and effectively; public speaking and presentation skills are preferred.
- Advanced knowledge of Microsoft Office Suite: Word, Excel, PowerPoint, Outlook, Teams
- Familiar with Salesforce CRM or similar relational database
- Research and reporting skills.
- Time management
- Self-organized, self-motivated
- Strong attention to detail, especially when reviewing financial information, entering data, or writing client communication.

Education and Experience:

Bachelors degree required, emphasis in business, accounting, or finance preferred

2 years' experience in financial analysis and restating financial statements.

2 years' consulting experience or senior role in consulting/client support

Certified Valuation Analyst credential preferred

Position breakdown:

Valuation coordinator will manage roughly 10 valuation engagements concurrently, on an ongoing basis.

- 20% of time spent reviewing financial information.
- 30% of time spent corresponding with clients via email or phone.
- 30% of time spent writing valuation reports
- 10% of time on process improvement
- 10% of time collaborating with other consulting departments

This role will partner with the following FP Transitions teams: Consulting, Analytics & Research, Legal, Advisor Services and Corporate Services.

Physical factors & working conditions: Full-time exempt; office environment, hybrid remote possible with manager's approval; some travel may be required

Compensation and Benefits:

- Salary DOE
- Medical Vision Dental, 401k with 25% employer match
- Company lunches, snacks, team-building events
- Company holidays (including employee's birthday) and accrued PTO

