

Business Advisory Analyst

Preferred Location: Mid-Atlantic Region

Introduction to Zenith

Zenith Wealth Partners (Zenith) is a financial services firm on a mission to combat racial, age based, and gender wealth inequality by delivering comprehensive, high quality, and accessible advice to individuals, businesses, and institutions. We believe that wealth management does not begin only when a client has accumulated significant wealth. Managing and achieving wealth is an infinite journey. Zenith works with its clients through our three core service lines, Investment Management, Financial Planning, and Business Advisory Services, to evaluate the best financial decisions while giving them back time and peace of mind.

Position Summary

In four short years, Zenith has built a high-functioning business advisory business. This function provides comprehensive financial management and consulting to small and medium-sized companies as well as high-growth startups. We deliver expert financial management to help companies grow and allow their management teams to focus on the core drivers of the business. To continue providing excellent advisory service to our existing clients and help fuel the next wave of growth, Zenith is seeking an Analyst to join our expanding Business Advisory Services team. The role is remote-first with periodic travel to Zenith's central office in Philadelphia. Reporting to the Head of Business Advisory Services, the Analyst will be responsible for:

- **Client Engagements**
 - Prepare financial models to support valuation, financial planning, forecasting efforts, and cash flow management.
 - Generate periodic financial statements and management reports.
 - Collaborate directly with clients to identify business challenges, opportunities, and growth strategies.
- **Capitalization Strategies**
 - Assist clients seeking financing to help them determine whether they should pursue debt vs. equity and explore available options that best meet their needs.
 - Develop supporting documentation such as investor-centric financial models.
 - Manage tactical projects such as cap table management and drafting term sheets.
- **Investment Due Diligence & Private Portfolio Management**
 - Perform due diligence analysis for private equity and private debt deals, including researching industry trends, company background, and financial statements.
 - Evaluate credit risk and return profiles for potential investments.
 - Generate due diligence reports and present findings to relevant stakeholders.

Desired Knowledge & Skills

- Experience in management consulting, investment banking, venture capital / private equity or other related finance roles; deep understanding of early stage venture financing, deal structures and due diligence processes
- First hand experience working with early stage startups is preferred (e.g. direct entrepreneurship or venture capital experience)
- Bachelors' degree from an accredited institution
- Excellent financial modeling skills with demonstrated proficiency in Excel; applicants should be familiar with common techniques including 3 statement modeling, DCF and LBO
- Detail-Oriented – You sweat the small stuff and take pride in your work
- Curious – You have a thirst for learning and eager to continue developing as a professional

- Translator – You can take a complex idea and make it easy to understand
- Client-Centric – You love building authentic relationships

Compensation & Perks

Zenith embraces a high-performance culture and seeks to reward employees that deliver exemplary results. The position will earn a competitive base salary of \$65,000 - \$75,000 based on experience and certifications with the potential to earn an annual performance incentive.

To deliver your best performance, we believe it is critical that you invest in self-care. Company benefits include (20) days paid time off, one day off to celebrate your birthday, and an additional (10) holidays observed by the NYSE. Additionally, employees will have access to health benefits (e.g., medical, and dental insurance). Zenith prides itself on being a supportive workplace dedicated to employees' personal and professional growth. Zenith reimburses all employees for up to \$1,000 to engage in continuing education.

Zenith provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability or genetics. In addition to federal law requirements, Zenith complies with applicable state and local laws governing nondiscrimination in employment in every location in which the company has facilities. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation and training.

Pre-employment background checks will be conducted for candidates offered employment.

Next Steps

We would love to hear from you and will be collecting candidate materials on a rolling basis.

Please submit your **resume** and a **short note to let us know what inspired you to apply** to Talent@NetworthZenith.com.