



Investment Bankers | Management Consultants | Valuation Experts

For the Wealth and Investment Management Industries

Company Overview

ECHELON Partners is a Los Angeles-based investment bank and consulting firm focused exclusively on the wealth and investment management industries. Over the past 20 years, the firm's principals have completed more M&A advisory assignments, valuations, and strategic consulting engagements for its two target industries than any other investment bank. In that time, hundreds of executive teams and boards have chosen ECHELON Partners to help them envision, initiate, and execute a diversity of complex business strategies and transactions.

ECHELON serves as a trusted advisor to the following types of companies: wealth managers: registered investment advisors (RIAs), financial planners, broker dealers, private banks, trust companies, high-net-worth boutiques, family offices, accounting firms, insurance companies, and aggregators of the previously listed; investment managers: mutual fund companies (open and closed-end), separate account managers (retail and institutional), hedge funds, private equity firms, venture capital firms, variable annuity managers, as well as ETF and index manufacturers; and those that serve them: custodians, wealthTECH providers, record keepers, prime brokers, fund administrators, and pension consultants.

These firms have chosen ECHELON to help them make the tough decisions with respect to: acquisitions, sales/divestitures, investments, mergers, valuation, M&A strategy, new ventures, management buyouts, capital raising, equity sharing, and succession planning.

ECHELON's business is making companies more valuable through its visionary advice and execution excellence. Accordingly, ECHELON measures its success by the enterprise value it creates for its clients. With an unparalleled quantity and quality of investment banking experience in the wealth and investment management industries, no other investment bank can match the caliber of advice or financial results delivered by the professionals of ECHELON Partners.

Managing Director Job Description

The Managing Director serves a critical role as the leader of an engagement team, and plays an active role in all aspects of the work including sourcing deals, delivering written and oral evaluations of business opportunities, preparing and delivering professional marketing presentations to investors, buyers, sellers, and prospective clients, performing detailed company and industry research, preparing financial models and valuation analyses, participating in due diligence and transaction negotiation sessions, and closely tracking industry trends.

We seek individuals that have the following attributes: an outstanding professional track record and proven leadership abilities; a thorough understanding of marketing, financial, and accounting practices; excellent written and oral communication skills, strong analytical and problem-solving skills, an aptitude for numbers and analysis, and the ability to successfully perform multiple assignments in a time-sensitive work environment. Candidates must possess an in-depth knowledge of the financial services industry (preferably related to investment product developers and distributors) and a related network of executive-level contacts.

In addition, we place a high value on the following personal qualities: resourcefulness, independence, self-motivation, and self-confidence. The Managing Director must also be able to work effectively with clients and team members, so strong interpersonal skills are essential.

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To qualify for this position, candidates must demonstrate and maintain a high level of achievement with respect to the following: capital raising, deal origination, deal processing, deals closed, investment results, number of board seats, number of stocks covered, maintaining and cultivating a robust network of contacts, experience building companies, and experience building management teams. Ten-plus years of prior work experience (with a financial services industry focus) in investment management (public and private equity), investment research, investment banking, management consulting, entrepreneurship, and/or law is highly preferred.

Managing Directors at ECHELON have an annual firm revenue requirement that is commensurate with their specific skills as well as with ECHELON's growth plan. As part of the ECHELON team, Managing Directors have the ability to leverage ECHELON's marketing programs, contact databases, and robust library of intellectual property. In addition, Managing Directors are afforded access to ECHELON's team of analysts and associates to assist with engagements and/or industry research.

How To Apply

If you meet the above requirements and are interested in exploring opportunities at ECHELON Partners, please submit your resume and cover letter to bmulder@echelon-partners.com.

Should you wish to apply, please make "MANAGING DIRECTOR FIRST NAME LAST NAME" (in all caps) as the subject line of the email.