



Title: Financial Analysis Consultant
Classification: Full-time exempt; Onsite, Hybrid Available
Department: Financial Analytics

Role Summary: The Financial Analysis Consultant, or FA Consultant, serves as a trusted advisor and engagement lead, guiding clients through complex business decisions related to valuation, succession planning, ownership transitions, and mergers and acquisitions. This role owns client engagements from scoping through delivery, translating client objectives into actionable consulting plans, directing analytical work performed by supporting analysts, and delivering strategic insights and recommendations that drive informed decision-making. Acting as the primary client contact, the FA Consultant leads discussions, manages engagement execution, and communicates findings through presentations, reports, plan summaries, and other deliverables.

FP Transitions Introduction: At FP Transitions, our team is dedicated to helping wealth advisory firms identify, build, and realize value. We are driven by innovation, collaboration, client-centricity, and objectivity. We are entrusted with mission-critical moments and drive life-altering business decisions. Join us in our mission to make a significant impact in the wealth advisory industry.

Ideal Candidate: The ideal candidate is an experienced consultant or business advisor who combines strong analytical capabilities with a natural ability to build trust and influence decision-making. They are comfortable leading client conversations, translating complex financial concepts into practical recommendations, and serving as the quarterback of an engagement from start to finish.

Essential Functions:

Client Advisory & Engagement Leadership

- Serve as the primary advisor and point of contact for clients throughout consulting engagements.
- Lead discovery, strategy, and decision-making conversations related to business valuation, ownership transitions, compensation strategies, succession planning, and transaction planning.
- Translate client goals and engagement scope into actionable consulting plans and recommendations.
- Build trusted relationships with business owners, advisors, and stakeholders by providing thoughtful guidance and practical solutions.

Strategic Consulting & Solutions Development

- Assess financial, operational, and organizational factors to identify opportunities, risks, and key value drivers.
- Apply expertise in valuation, equity transactions, compensation design, and M&A concepts to develop recommendations tailored to each client's objectives.
- Evaluate strategic alternatives and help clients understand tradeoffs, implications, and potential outcomes to support informed decision-making.



Engagement Oversight & Delivery

- Partner with our analyst team to scope and deliver analytical models that illustrate and support recommendations made during the consulting process, including cash flow models, equity sale illustrations, compensation plan modeling, valuation models, and supporting deliverables, ensuring accuracy, quality, and alignment with engagement objectives.
- Own engagement execution from initiation through delivery, managing timelines, priorities, and client expectations.
- Develop and deliver client-facing reports, presentations, plan summaries, letters of intent, and other materials that clearly communicate insights and recommendations.

Practice Excellence & Team Contribution

- Contribute to the enhancement of consulting methodologies, deliverables, and best practices.
- Provide mentorship and constructive feedback to analysts and team members.
- Stay current on industry trends, valuation practices, transaction strategies, and regulatory developments affecting clients and engagements.

Required knowledge, skills, and abilities:

- Strong understanding of business valuation methodologies, financial statement analysis, financial modeling, and business economics.
- Ability to flex as a subject matter expert to support the sales cycle for FP Transitions' consulting projects while managing delivery of projects under your portfolio.
- Demonstrated ability to establish credibility and develop trusted advisor relationships with clients and stakeholders.
- Exceptional verbal, written, and presentation skills.
- Ability to explain complex financial information to both technical and non-technical audiences.
- Confidence facilitating client meetings, delivering presentations, and leading strategic discussions.
- Strong consultative listening skills with the ability to uncover client needs and align solutions to business objectives.
- Advanced proficiency with Microsoft Office Suite, Salesforce CRM or similar database.
- Excellent project management and organizational skills.
- Ability to manage multiple client engagements and competing priorities.
- Self-motivated, highly accountable, and capable of working independently and collaboratively.

Education and Experience:

- 8 + years of experience in financial consulting, business valuation, transaction advisory or related field.
- BA in Finance, Accounting, Economics, Business Administration, or a related discipline preferred.
- Professional credentials such as CVA, CFA, ABV, CPA, or similar designations strongly preferred.



- Experience advising clients within wealth management, financial services, professional services, or closely related industries preferred.

Compensation and Benefits:

- \$100,000-\$130,000/year DOE + performance-based bonuses.
- Medical, Vision, Dental, 401k with discretionary employer match.
- Company holidays (including employee's birthday) and accrued PTO.
- Company lunches, snacks, and team-building events.

Physical Factors and Working Conditions: Professional office environment, on-site, minimal travel required.

