FP TRANSITIONS®

Title: Mergers & Acquisitions Consultant
Classification: Full-time exempt; onsite; hybrid potential for the right candidate
Department: Mergers & Acquisitions (M&A)

FP Transitions Introduction: FP Transitions is a premier M&A and consulting firm in the wealth management sector, handling over 100 transactions annually. With a deep understanding of the industry and a commitment to client success, we facilitate seamless transitions and strategic partnerships, helping firms optimize their growth and value. Our expertise not only enhances deal execution but also supports clients in navigating the complexities of mergers and acquisitions.

Role Summary: M&A Consultants serve as strategic advisors, expertly guiding clients through the complexities of the M&A landscape to identify optimal pathways and partnerships for their organizations, employees, and stakeholders. Acting as the central orchestrator, they ensure the efficient and successful execution of transactions. Each M&A Consultant manages a diverse portfolio of 15-20 concurrent transactions, demanding a blend of strategic insight and operational excellence.

M&A Consultants are exceptional communicators who engage with clients and senior leadership to deliver strategic insights and guidance. They excel at anticipating client needs, providing consultative support, and facilitating the successful execution of transactions. While collaborating closely with their teams and leveraging cross-functional resources, M&A Consultants are also expected to operate autonomously, demonstrating initiative and proactive communication to address challenges as they arise.

Essential Functions:

- Deal Execution: Lead and execute high-value transactions, including identifying potential buyers, negotiating deal structures, and overseeing the end-to-end deal lifecycle.
- Strategic Advisory: Provide expert counsel on deal structuring, risk assessment, and long-term implications of M&A activities.
- Project Management: Independently manage multiple concurrent transactions, ensuring milestones are met and deliverables are produced with exceptional quality.
- Data Collection: Conduct comprehensive data collection and analysis to identify market trends, potential targets, and value drivers, delivering actionable insights to support M&A strategies and decision-making.
- Maintain accuracy: Record client interactions and update internal communication channels with relevant updates.
- Client Relationship Management: Build and sustain relationships with key stakeholders, including C-level executives and private equity.
- Problem Solving: Proactively identify and anticipate potential challenges in the M&A process, serving as a consultative guide to clients while developing tailored financial solutions to address and resolve complex issues

- Industry Knowledge: Maintain current knowledge of industry trends, best practices, and emerging technologies. Share insights with clients to ensure their businesses remain competitive and innovative.

Required Skills/Experience:

- 3-5+ years of experience in mergers and acquisitions, investment banking, private equity, or related consulting fields.
- Expertise in capital structuring, financing strategies, and deal structuring
- Experience in the financial services or wealth management industry
- Proven experience in project coordination or management, with a track record of delivering projects on time and within scope.
- Advanced degree or credentials strongly preferred (e.g. JD, MBA, CFA, CPA).

Preferred Skills:

- Solid computer skills, including proficiency with MS Office (Excel & PowerPoint).
- Experience with tech platforms such as Salesforce, Slack, and Tableau.
- Well-organized and detail-oriented with strong project management skills.
- Exceptional communication, writing, and ability to handle confidential information.
- Strong analytical, strategic and creative problem-solving skills.

Compensation and Benefits:

- $75,000-$85,000/year base compensation, total OTE $100,000+ with variable commission.
- Medical, Vision, Dental, 401k with 25% employer match
- Company-provided lunches, snacks, and team-building events.
- Company holidays (including employee’s birthday) and accrued PTO.

Physical Factors and Working Conditions:

- Full-time exempt; office environment, hybrid remote possible with manager’s approval; minimal travel required.