



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, financial technology 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.

## Analyst Intern Job Description

Analyst Interns at ECHELON are integrally involved in all aspects of the company's three core businesses: investment banking, private equity, and strategy consulting. ECHELON Analyst Interns are involved in a diversity of related tasks which include sourcing deals; developing and 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.

**ECHELON** is committed to establishing and maintaining a unique culture that is based on mutual respect, service excellence, and merit-based achievement. The ECHELON vision is to create a challenging and entrepreneurial environment where individuals can become their best through interaction with talented peers. ECHELON hires the most-qualified individuals that share this belief in inter-personal and professional excellence. ECHELON rewards team members based on their individual success and that of the overall organization.

## Analyst Intern Required Qualifications

ECHELON seeks highly motivated people with outstanding academic credentials and a strong record of extracurricular activity, professional accomplishment, and leadership. It is also important that candidate have a thorough understanding of finance, accounting, economics, and marketing; superior analytical and problem-solving skills; and superb written and oral communication skills.

All Analyst Intern candidates must meet the following requirements:

- ▶ the ability to work in Manhattan Beach
- ▶ demonstrable finance and accounting skills;
- ▶ outstanding communication skills;
- ▶ a working knowledge of traditional and web-based marketing & graphic design is a plus;
- ▶ experience conducting business-oriented research and analysis;
- ▶ a high level of motivation and resourcefulness;
- ▶ an ability to think strategically and evaluate critical business issues;
- ▶ advanced proficiency in Microsoft Excel, Word, PowerPoint, and Outlook; and
- ▶ the dedication to make a significant contribution to personal development.

### Proving the Value of the Internship

After interning at ECHELON Partners, some return to ECHELON to work full-time. Others have been successful at obtaining positions at a host of other well-respected firms. ECHELON has played a role in providing these interns with the skills and experiences required to obtain full-time positions at top tier investment banks and consulting firms. This is one of the primary goals the ECHELON management team has for its interns.

Past ECHELON interns have gone on to pursue their professional goals at all of the firms listed below:

- |                                                              |                                                   |
|--------------------------------------------------------------|---------------------------------------------------|
| ▶ Accenture, Management Consulting                           | ▶ Intuit, Management Training Program             |
| ▶ Aimco Capital, Specialty Financial Services                | ▶ J.D. Power & Associates, Management Consulting  |
| ▶ Apple Inc., Business Analyst                               | ▶ Jefferies & Company, Inc., Investment Banking   |
| ▶ B. Riley & Co., Investment Banking                         | ▶ J.P. Morgan & Co., Investment Banking           |
| ▶ Bain & Company, Management Consulting                      | ▶ Kerlin Capital, Investment Banking              |
| ▶ Banc of America Securities, Equity Research                | ▶ LECG, Inc., Management Consulting               |
| ▶ Bank of America Merrill Lynch, Investment Banking          | ▶ Lovell Minnick Partners, Private Equity         |
| ▶ Bank of the West, Corporate Finance                        | ▶ Morgan Stanley, Investment Banking              |
| ▶ Clearlight Partners, Private Equity                        | ▶ Piper Jaffray, Equity Research                  |
| ▶ Credit Suisse, Investment Banking                          | ▶ RBC, Investment Banking                         |
| ▶ Four Corners Capital Management, Investment Management     | ▶ Standard & Poor's, Business Valuation Group     |
| ▶ Goldman Sachs, Private Client Services, Investment Banking | ▶ UBS, Investment Banking, Sales & Trading        |
| ▶ Houlihan Lokey, Investment Banking                         | ▶ USBX, Investment Banking                        |
| ▶ HSBC Securities Inc., Investment Banking                   | ▶ Western Asset Management, Investment Management |

**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 [nhoracek@echelon-partners.com](mailto:nhoracek@echelon-partners.com).

Should you wish to apply for a Spring/Summer 2023 internship, please make "SPRING/SUMMER ANALYST INTERN FIRST NAME LAST NAME" (in all caps) appear as the subject line of the email.

Position Summary	
<b>Location</b>	Manhattan Beach, CA – <b>In Person</b>
<b>Position Type</b>	Temporary
<b>Employment Type</b>	Flexible
<b>Title</b>	Analyst Intern
<b>How to Apply</b>	Email Resume and Cover Letter to <a href="mailto:nhoracek@echelon-partners.com">nhoracek@echelon-partners.com</a>