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.

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Associates serve a critical role in supporting and leading engagement teams and play an active role in all aspects of strategic consulting, and investment banking projects 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.

ECHELON remains committed to developing and maintaining a unique culture based on mutual respect, a unified vision, and the notion that work can be fun. The ECHELON vision is to create a challenging and entrepreneurial environment where individuals have high expectations of themselves and the professionals with whom they work. Our mission is to be the premier investment bank and consulting firm focused exclusively on the wealth and investment management industries. We seek to hire the most-qualified individuals who share the collective goal of continually exceeding client expectations on all assignments we undertake. ECHELON is committed to the professional development of every team member and to offering exciting and rewarding long-term career growth opportunities.

Associate Qualification Requirements

ECHELON is looking for highly motivated individuals with outstanding academic credentials and strong track records of extracurricular involvement, professional accomplishment, and leadership. A thorough understanding of marketing, financial, accounting and entrepreneurship are also desired. Superior analytical or problem-solving skills, an aptitude for numbers and analysis, and the ability to successfully perform multiple assignments in a time-sensitive work environment are also required. Candidates must possess an in-depth knowledge of the financial services industry (preferably related to wealth and investment management) and a related network of contacts.

ECHELON places a high value on resourcefulness, organization, thoroughness, independence, and self-motivation. Associates must also be able to work effectively with clients and team members, so strong interpersonal skills are also essential. To qualify for this position, candidates must demonstrate and maintain a high level of achievement with respect to the following: developing and writing research reports, preparing professional marketing presentations to investors, buyers, sellers, and prospective clients, performing detailed company and industry research, preparing financial models and valuation analyses, preparing and conducting target marketing campaigns, participating in due diligence and transaction negotiation sessions, and closely tracking industry trends. Experience with broker-dealer compliance is a plus.

As part of the ECHELON team, Associates have the ability to leverage ECHELON's marketing programs, contact databases, and robust library of intellectual property. In addition, Associates are afforded access to ECHELON analysts to assist with engagements and/or industry research.

All Associate candidates must meet the following requirements:

- the ability to work in Manhattan Beach
- 3-5 years of investment banking, private equity, or consulting (applicants will be considered from other backgrounds but the aforementioned are preferred);
- outstanding communication skills;
- 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.

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 ssphire@echelon-partners.com.

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