



## **Investment Banking Analyst – Technology**

Presidio is seeking an Investment Banking Analyst to add to our Technology team in our San Francisco Office.

### **Firm Description**

Presidio, a fast-growing financial services firm offering wealth management, investment banking and private equity services, is seeking an experienced Investment Banking Analyst to join its team in San Francisco. The Presidio Group specializes in providing financial advisory services to entrepreneurs, their families, and their companies. We believe that wealth creation and preservation requires a keen understanding of the needs of successful entrepreneurs, and their corporate assets.

- Our investment banking group provides strategic and financial advisory services, including mergers, acquisitions and private placements, to leading emerging growth companies in a focused set of industries.
- Our private equity group provides investment capital to entrepreneurs and the companies they lead.
- Our wealth advisory group represents individuals, families and their charitable entities, and provides them with independent, objective financial advice.

### **Job Description, Qualifications and Responsibilities**

Presidio is looking to hire a highly motivated investment banking analyst who has a strong interest (or experience) in the technology industry. The analyst will have the opportunity to work with the Technology-Enabled Business Services investment banking team which includes Bill Lamm (Managing Director), Katie Benson (Vice President) and two analysts. Our analysts work in small deal teams and regularly interact with C-level clientele. The candidate must be a self-starter, highly motivated team player with an ability to work in a fast-paced, entrepreneurial and small firm environment. The qualifications and responsibilities of the investment banking analyst are listed below:

#### **Qualifications:**

- Bachelor's degree required; Finance, Accounting, Economics, Engineering or a business-related degree preferred
- Minimum of 6 months experience as an Investment Banking Analyst preferred
- Internship or prior work experience in financial services industry preferred
- FINRA Series 79 & 63 certification (either current or able to obtain in first 6 months)
- Excellent work ethic and a high level of enthusiasm and initiative
- Strong quantitative understanding and financial modeling skills
- Excellent written skills including the ability to prepare written materials (client pitches, transaction memorandums, etc.).



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- Proficient in MS Office, including Excel, Word & PowerPoint
- Ability to manage expectations of senior bankers while working on projects simultaneously
- Ability to interact with C-level clientele

**Responsibilities:**

- Assist senior bankers on the Technology-Enabled Business Services team with new business development and day-to-day deal execution
- Conduct in-depth industry-specific and company-specific research, assist in the creation of marketing pitch materials, and building financial models to value potential clients
- Assist in all transaction-related activities including complex financial modeling and valuation analyses, preparing confidential information memoranda and management presentations, coordinating business due diligence, creating and managing online data rooms, building relationships with clients and any other support services required to assist in completing an engagement.
- Organize, track and manage a database of industry comps in a fast-paced work environment, as well as help to update industry newsletters

**Salary and Benefits**

Salary commensurate with experience. As part of our team, you will be eligible for the following:

- Performance-oriented bonus
- Retirement plan with matching contributions
- Medical and Dental Coverage
- Flex Spending and Commuter Benefits
- Paid time off for sick days
- 9 paid holidays per year plus vacations

Please note, due to the high level of responses to our listings, we can only contact those applicants who demonstrate, from the information supplied in their resume, that they meet the short-listing criteria for this position.

If you possess these attributes, we would like to hear from you.

**Please submit your resume to Katie Benson, at [kbenson@thepresidiogroup.com](mailto:kbenson@thepresidiogroup.com)**