

JOB DESCRIPTION	
POSITION TITLE:	Manager of Valuations
REPORTS TO:	
ORIGINATION DATE:	September 27, 2023
REVISION DATE:	NA
DOCUMENT CONTROL #:	JD 23-007
CLASSIFICATION:	Full-Time, Exempt

SCOPE OF WORK: The primary purpose of the Manager of Valuations is to oversee and lead the business valuation function of the company. Responsibilities include expert analysis, evaluation, and documentation of the value of businesses, helping clients make informed decisions related to mergers and acquisitions, financial reporting, strategic planning, tax planning, and other business transactions.

The Manager of Valuations plays a critical role in assisting clients in understanding the worth of their businesses by conducting thorough research, utilizing appropriate valuation methodologies, and preparing comprehensive reports that provide insights and recommendations. This position will support clients in making informed decisions regarding the buying or selling of businesses, securing financing, resolving disputes, or complying with regulatory requirements. with accurate, reliable, and well-documented valuations. Additional responsibilities will be to ensure that clients receive high-quality valuation services, contributing to their business success and helping them achieve their financial objectives.

ESSENTIAL DUTIES:

- Performs detailed analysis and valuations of businesses using various methodologies, such as discounted cash flow, market multiples, and comparable transactions.
- Creates and maintains complex financial models to evaluate the financial performance, projections, and potential risks of businesses under valuation.

- Gathers and analyzes industry-specific data, market trends, economic factors, and comparable company information to support valuation assessments and provide accurate and insightful analysis.
- Creates comprehensive valuation reports, including detailed analysis, findings, and recommendations, ensuring high-quality documentation that meets professional standards and client expectations.
- Interacts and collaborates with clients to understand their specific needs, address queries, and present valuation findings in a clear and concise manner, establishing and maintaining strong client relationships.
- Oversees a team of valuation professionals, providing guidance, mentoring, and feedback on valuation methodologies, techniques, and best practices, while ensuring timely completion of projects.
- Coordinates and manages multiple valuation engagements simultaneously, setting timelines, allocating resources, and ensuring adherence to project goals, budgets, and deadlines.
- Conducts reviews and quality assurance checks on valuation reports and deliverables to maintain accuracy, consistency, and compliance with industry standards, legal requirements, and professional ethics.
- Collaborates with the business development team to identify potential valuation opportunities, prepare proposals, and participate in client presentations, contributing to the growth and expansion of the firm.
- Stays updated with industry developments, regulations, and best practices through ongoing professional education and networking, maintaining professional certifications and licenses.

NON-ESSENTIAL DUTIES:

- Delivers presentations to clients or other stakeholders, showcasing valuation findings, explaining methodologies, and answering questions.
- Engages in consultations with clients to understand their unique requirements, address concerns, and provide guidance on valuation-related matters.
- Works closely with legal professionals to provide valuation support for litigation, dispute resolution, or other legal proceedings.
- Attends and participates in industry conferences, seminars, or workshops to stay updated on industry trends, network with professionals, and enhance knowledge in the field of valuations.
- Offers expert testimony in legal or arbitration proceedings, providing insights and supporting valuation opinions based on professional expertise and analysis.

- Assists clients in conducting due diligence activities, assessing the value and financial health of potential acquisition targets or investment opportunities.

PREREQUISITE KNOWLEDGE, SKILLS, AND EDUCATION:

- Possess strong analytical skills with a deep understanding of financial statements, financial modeling, and business valuation methodologies.
- Proficiency in analyzing complex financial data is crucial for accurately assessing the value of businesses.
- In-depth knowledge of various business valuation methodologies, such as discounted cash flow (DCF), market multiples, and comparable transactions. Familiarity with their application, strengths, limitations, and interpretation is necessary for conducting comprehensive valuations.
- A solid understanding of different industries and sectors to effectively evaluate and assess the unique factors and risks that impact the value of businesses within those industries.

- Proficient in conducting thorough research, gathering relevant data, and performing comprehensive data analysis. Strong attention to detail and the ability to identify trends, patterns, and key insights from data are essential.
- Advanced skills in financial modeling, including building and maintaining complex financial models using Microsoft Excel or other relevant software. This includes expertise in creating financial projections, scenario analysis, and sensitivity testing.
- Excellent written and verbal communication skills to prepare clear, concise, and well-structured valuation reports. The ability to effectively communicate complex valuation concepts and findings to clients and stakeholders is vital.
- Strong project management skills to effectively manage multiple valuation engagements, set priorities, allocate resources, and meet project timelines and deliverables.
- Bachelor's degree in related field.
- Minimum of 3 years of related experience required.
- Professional certifications such as CFA, ASA, or CVA preferred.

PHYSICAL AND MENTAL REQUIREMENTS:

- Ability to sit for extended periods of time.
- Ability to work and communicate well with other employees and management.

- Ability to perform work utilizing manual dexterity of the hands.
- Ability to read, write, and understand English.
- Ability to work in a fast-paced environment.
- Correctable vision and hearing.
- Ability to work remotely in a home office environment.

This job description is not intended to be all-inclusive, and the employee may also be asked to perform other reasonably related job duties as assigned by their immediate supervisor as required. All employees may be required to perform duties outside of their normal responsibilities from time to time as needed.