

| JOB DESCRIPTION | |
|----------------------------|------------------------------------|
| POSITION TITLE: | Director/Sr Director of Valuations |
| REPORTS TO: | |
| ORIGINATION DATE: | September 27, 2023 |
| REVISION DATE: | NA |
| DOCUMENT CONTROL #: | JD 23-006 |
| CLASSIFICATION: | Full-Time, Exempt |

SCOPE OF WORK: The primary purpose of the Director/Sr Director of Valuations position is to lead and oversee the valuation department within Sofer Advisors, LLC. This position exists to ensure the efficient and accurate valuation of businesses, assets, and securities for clients. By managing a team of valuation professionals, the Director/Sr Director of Valuations is responsible for delivering high-quality valuation services, maintaining client relationships, driving business growth, and upholding professional standards and best practices.

The Director/Sr Director of Valuations plays a critical role in the company's success by providing strategic leadership, ensuring exceptional service delivery, and fostering a culture of excellence within the Company. This position exists to meet the needs of clients who require expert analysis and valuation expertise, and to support the overall growth and profitability of Sofer Advisors, LLC.

ESSENTIAL DUTIES:

- Leads and provides strategic direction for the valuation department, aligning it with company objectives.
- Manages, trains and mentors a team of valuation professionals, fostering a collaborative and high-performance culture.
- Engages and builds strong relationships with high-profile clients, ensuring exceptional service delivery.
- Oversees and manages the execution of valuation engagements, ensuring accuracy and timely completion.
- Establishes and maintains quality control procedures to ensure compliance with professional standards.

- Conducts complex financial analysis and modeling, utilizing various valuation methodologies.
- Performs thorough due diligence on companies being valued, analyzing financial statements and industry dynamics.
- Prepares comprehensive valuation reports and delivers presentations to effectively communicate findings.
- Stays updated on valuation industry trends and best practices, researches valuation methodologies and guidance and provides thought leadership.
- Participates in industry conferences, seminars, and workshops to stay updated on emerging valuation practices.

NON-ESSENTIAL DUTIES:

- Identifies and pursues new business opportunities, expanding the client base and driving revenue growth.
- Conducts specialized research and analysis for complex valuation cases requiring unique expertise.
- Provides expert witness testimony or support in litigation cases involving valuation matters.
- Assists in the development and implementation of training programs for valuation team members.
- Collaborates with cross-functional teams on special projects or initiatives requiring valuation expertise.

PREREQUISITE KNOWLEDGE, SKILLS, AND EDUCATION:

- **Advanced Financial Analysis:** Strong proficiency in financial analysis and modeling is essential, including a deep understanding of valuation methodologies and financial statement analysis.
- **Valuation Expertise:** Extensive knowledge of valuation principles, techniques, and industry standards, with the ability to apply them in various contexts and industries.
- **Leadership and Management:** Demonstrate leadership abilities, including experience in leading teams, providing guidance and mentorship, and fostering a collaborative work environment.
- **Strategic Thinking:** Demonstrate the capability to think strategically and develop a long-term vision for the valuation department, aligning it with the overall goals and objectives of the company.
- **Client Relationship Management:** Excellent interpersonal and communication skills to build and maintain strong relationships with high-profile clients, understanding their needs, and delivering exceptional service.

- Industry Knowledge: Continuous learning and staying updated on industry trends, changes in valuation methodologies, and regulatory developments to provide thought leadership and ensure compliance.
 - Project Management: Strong project management skills to effectively oversee valuation engagements, ensuring accurate and timely completion within established timelines.
 - Research and Analysis: Proficiency in conducting comprehensive research, analyzing complex financial data, and synthesizing information to draw accurate conclusions and support valuation decisions.
 - Communication and Presentation: Excellent written and verbal communication skills to prepare comprehensive valuation reports, deliver presentations, and effectively communicate complex valuation concepts to clients and stakeholders.
- A bachelor's degree in finance, accounting or a related field required.
 - Must have at least 8 years of related experience.
 - A master's degree in finance, accounting, or a related field preferred.
 - Professional certifications such as CFA, ASA, CVA, CPA, ABV, or CBA 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.