BARTON WALTER & KRIER

Certified Public Accountants

Transaction Advisory Services (TAS) Senior Associate/Associate

Firm Background

Barton, Walter & Krier, P.C. is a full-service CPA and Business Advisory firm with the talent and expertise to offer an array of accounting, audit, consulting and tax services. We are committed to developing strong customer relationships so that we can better understand our clients and assist them with year-round planning. We listen to our clients' needs and strive to exceed expectations.

At Barton, Walter & Krier, P.C., we offer a dynamic work environment that is both supportive and engaging. We foster a culture of innovative thinkers and are proud to support you in your professional goals. If you are passionate about helping clients succeed at a collaborative, innovative and experienced firm, BWK is the place for you.

Job Summary

The Transaction Advisory Services (TAS) Senior Associate or Associate will gather and interpret data, perform financial analysis and other ad hoc analyses, support the TAS team's Quality of Earnings work and reporting, and perform other financial modeling projects for clients related to engagements for buy-side, sell-side, mergers, financial statement analysis, and other ad-hoc projects.

Key Accountabilities:

- Collaborate with team members to collect data from numerous data sources, filter and analyze the data to support TAS Team recommendations and reports.
- Use graphs, infographics and other methods to visualize data and form client reports.
- Collect information required in the due diligence process, organize and maintain the secure information database during the process and assist in the financial due diligence process.
- Prepare discussion materials (data books and agendas) for meetings with Buyers, Sellers, target companies, management teams, clients, and other key M&A parties.
- Participate in discussions with business owners and C-level executives.
- Assist with analyses related to purchase price implications and considerations including normalized earnings, profitability, working capital, indebtedness, cash, capital expenditures, separation costs, synergies, stranded costs, etc.
- Assist in the preparation of the Due Diligence or Quality of Earnings Report and / or Data Book deliverables.
- Provide financial models and forecasting guidance for clients.
- Provide assistance to other service groups in the firm on various software packages used by the firm and TAS.
- Assist in audit file reviews as part of our due diligence work.
- Attend networking events and develop relationships with clients and advisors.
- Assist in enhancements to standard models, templates, processes, and procedures.
- Assist with scopes of projects, including review of preliminary information received.
- Assist with marketing efforts and market research.

Skills / Qualifications:

- Strong analytical, financial modeling and problem-solving skills with attention to detail.
- Ability to set and meet deadlines.
- Ability to identify trends and patterns in complex data sets.
- Top-notch analytic skills, including data mining, evaluation and reporting.
- Ability to demonstrate proficiency in the use of MS Word, MS Excel, MS Access, MS PowerPoint, Power BI, Power Query, Alteryx, and data room / file sharing software.
- Understanding of US Generally Accepted Accounting Principles (GAAP).
- Understanding of accounting policies and procedures.
- Understanding of valuation models and techniques.
- Awareness of the M&A lifecycle.
- The ability to be a key contributor in a cross-functional team setting.
- Good oral and written communication skills.

Requirements:

- A bachelor's degree in accounting or finance.
- 2 years of experience in a similar role.
- Credentials or the desire to gain these credentials would be a plus – CPA, CVA, CFA, or other M&A-related licenses.
- Ability to travel as needed.