Analyst – Investment Banking – Public Finance

Location: New York, NY  
Full/Part-Time: Full-Time

FLSA Status: Exempt  
Equal Employment Opportunity Employer

Position Summary:

The objective of this position is to provide support to senior bankers and associates on all aspects of business development and deal acquisition.  This includes, but is not limited to, ongoing client coverage, relationship management, deal management and execution and revenue generation.  Under the supervision of Senior Bankers, Analysts assist state and local governments access the capital markets through the sale of tax-exempt and taxable securities. **Candidates with very strong quant backgrounds are encouraged to apply.  Candidates with STEM related educations, who are interested in Public Finance, are ideal for this role.**

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Essential Duties and Responsibilities:

* Update, create and review debt profiles for target clients
* Prepare client memos and presentation materials
* Run new money and refunding numbers, as needed
* Act as project manager for request for proposals by:
  + Prepare non‐finance plan responses
  + Coordinate with other departments to get necessary information
  + Draft finance plan for RFPs
* Provide analytical support on all senior managed and co‐managed financings, including:
  + Read and provide comments to documents
  + Draft rating agency/investor presentations, as required,
  + Coordinate and interact with the underwriting desk
  + Communicate with other members of the financing team
  + Assist with due diligence and compliance
* Facilitate, attend, and participate in meetings and conference calls
* Complete and distribute internal deal related forms (i.e. sales memo, profit & loss statements)
* Maintain client files
* Alert team to financing opportunities and take action as appropriate
* Keep banking team aware of relevant news regarding ongoing client coverage and relationship management
* Additional duties may be assigned

Qualifications:

* Bachelor’s and/or advanced degree in STEM (Science, Technology, Engineering, Mathematics) is strongly is preferred
* Exceptional quantitative skills are required for this role
* Previous work experience within the Municipal investment banking industry in Capital Markets or Public Finance is preferred
* Effective project management skills
* Proficiency with Microsoft Office (Excel, PowerPoint, Word, etc.)
* Previous experience working in a team-based environment
* Strong communication skills (verbal, written and active listening)
* Detail-oriented and results driven
* Ability and willingness to think through problems / critical thinking skills
* Excellent qualitative and research skills
* Strong work ethic
* Self-motivated and confident; ability to work with minimal supervision
* Strong customer service and relationship building skills
* Ability to exercise discretion in handling confidential information
* Ability to work with all levels of employees and clients
* Willingness to work outside of a 9:00 am to 5:00 pm schedule and on weekends
* *Candidate will be required to successfully complete the Securities Industry Essentials (SIE) exam, the Municipal Securities Representative exam (Series 52), the Uniform Securities Agent State Law exam (Series 63) and the Investment Banking Representative exam (Series 79). Accordingly, candidate will have thirty (30) days from the date of hire to pass the SIE exam, and sixty (60) days thereafter to pass the Series 52 exam. Candidate will have nine (9) months from the date of hire to pass the Series 63 and Series 79 exams*