

<b>Role Title</b>
<b>Private Equity Senior Associate</b>
<b>Role Summary</b>
We are seeking to add talent to our growing investments team in Toronto. The Senior Associate is responsible for supporting investment origination, due diligence, structuring, execution and management of portfolio companies. They take an active role with Partners and Managing Directors to own the planning and management of due diligence and execution. The Senior Associate will gain exposure to the Board of Directors of portfolio companies and interact with their management teams on an ongoing basis to assist in the execution of growth plans, improvement of operations and overall value creation. Senior Associates will develop a strong expertise in the portfolio companies in which they are involved and will use this experience in developing the growth and exit plans for these investments, and to create the analytic reporting to monitor company performance.
<b>Role Responsibilities</b>
<ul style="list-style-type: none"><li>● <b>Due diligence and transaction execution</b><ul style="list-style-type: none"><li>○ Key member of the deal team throughout the entire process with the support of senior Clairvest team members;</li><li>○ Key supporting role in the due diligence and assessment of the investment risks and opportunities and management of external resources (including, quality of earnings, tax, legal, environmental, etc.);</li><li>○ Support on-site due diligence meetings with the management teams and advisors; and</li><li>○ Take active role in formulating the post-acquisition planning (100-day plan).</li></ul></li><li>● <b>Investment management</b><ul style="list-style-type: none"><li>○ Work as a partner to the portfolio companies. Play an active role – together with company management and senior Clairvest resources – in the development and execution of their long-term strategic plans;</li><li>○ Maintain relationships with management of portfolio companies via regular phone calls, on-site meetings and presence at the Board of Directors meetings (typically in a Board observer role);</li><li>○ Remain current on market trends (through both primary and secondary sources) and the competitive landscape and their impact on portfolio companies;</li><li>○ Develop and maintain ongoing reporting to monitor financial and operating performance of portfolio companies:</li><li>○ Monitor financial performance and cost optimization by participating in the budgeting process and review of operational expenses.</li><li>○ Prepare reports at least quarterly outlining the performance of portfolio companies along with an update of their business plans.</li><li>○ Support portfolio company review and execution of tuck-in acquisitions</li><li>○ Maintain relationships with key external stakeholders including bankers, accountants, lawyers and tax professionals.</li></ul></li><li>● <b>Origination and Sourcing</b><ul style="list-style-type: none"><li>○ Foster long-term relationships with industry participants such as entrepreneurs and brokers in select domains to position Clairvest as the partner of choice for high-quality investments;</li><li>○ Promote the visibility of the firm at events, conferences and tradeshows;</li><li>○ Develop theses and ideas on attractive sectors to pursue for new investments; and</li><li>○ Manage potential prospects via Clairvest’s CRM platform.</li></ul></li></ul>

- Viewed as trusted resource internally and a trusted partner of the portfolio company management.
- Strong desire to learn all attributes of private equity and the Clairvest approach

### **Role Qualifications**

- 3-5+ years of relevant experience (in either or both operating and advisory capacities) in one or more of the following areas:
  - strategy consulting;
  - investment banking; and
  - highly relevant corporate development or entrepreneurial roles;
- Relevant Undergraduate degree.
- MBA/Post graduate education from top tier institution; Professional designation (CFA, CA, CPA) an asset.
- Superior analytical skills with the ability to prepare in-depth financial and risk analysis; Strong understanding of applied investment and valuation analysis
- Strong communication skills, both written and oral.
- Demonstrated ability to influence and engage senior leadership.
- Investment mindset, self-starter, team-oriented, detail-oriented, and proven ability to perform in high-expectation environment
- Self-motivated, entrepreneurial and hands-on investor who understands ground reality and has a “roll-up the sleeves” approach. Resourceful and flexible. Able to manage multiple priorities at the same time.
- Intellectually curious, creative thinker, and comfortable with ambiguity.
- Demonstrated team player with a collaborative and low-ego working style which will assimilate easily into the Clairvest culture.
- Ethics and personal integrity.
- Tenacity and commitment

Please note, our team works in person in the office at Yonge and St. Clair