

Financial Analyst

(part-time consultant)

Project Equity grows community wealth by retaining successful local businesses through employee ownership transitions

Do you want to see a world where the average employee has economic security and businesses help build resilient communities? So do we! Project Equity helps employees become owners of the businesses where they work. We raise awareness of employee ownership (EO) as a business succession strategy, conduct business outreach and education, and provide direct support for business owners and employees to transition to employee ownership. Project Equity is currently expanding into multiple regions around the country.

Help us tap incredible momentum

Project Equity's success has garnered coverage from media outlets such as Forbes, Fast Company, National Public Radio (NPR) and the Washington Post and has propelled us forward as a national leader in the movement to harness employee ownership to maintain thriving local businesses, create quality jobs, and address income and wealth inequality.

As part of our mission to scale employee ownership, Project Equity supports businesses with the financial analysis necessary to support the transition to employee ownership.

Your role

As the Financial Analyst, you will conduct financial feasibility assessments for Project Equity clients as part of a client team using Project Equity's proprietary EO Feasibility Model.

What you will do

Reconcile financial statements

- Create comparative statements in Project Equity's Feasibility Model using original client numbers, including P+Ls, Balance Sheets, and Cash Flow statements.
- Recategorize or clean up line items as needed.

Conduct historical analysis

- Calculate, examine, and compare growth percentages for each line item, particularly annual revenue, EBITDA, and profit.
- Dig into company trends, including determining past growth rates and cost drivers specific to the company.
- Understand the Balance Sheet position and changes over the period.
- Create a list of questions for the client to clarify inconsistencies and/or fluctuations in historical data, as well as to form the basis for developing financial projections.

Develop financial projections

- Develop 5-year revenue and cost projections based on client and market data, in consultation with the client team.
- Create best, base, and worst case scenarios based on the unique situation of each business.
- Benchmark company growth rate, COGS, and Balance Sheet using IBIS reports (log-in information to be issued) and other sources as needed.
- Refine through consultation with the Project Manager and client.
- Ensure integrity of the Feasibility Model through all changes (e.g. separate worksheets remain linked, formulas remain intact, etc.).

Model debt capacity analysis and deal structure

- Calculate 10-year Free Cash Flow scenarios in consultation with the Project Manager.
 - Calculate estimated debt capacity of the future company using free cash flow scenarios.
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- Model seller note, bank note, and earnout deal structures based on debt capacity analysis and client preferences.
- Support iteration of scenarios as needed.

Prepare and attend meetings

- Attend internal planning meetings with the Project Manager.
- Communicate with Project Manager via email and Zoom as needed. May communicate directly with clients via email as appropriate.
- Support development of client materials, including presentation slides, financial summaries in pdf form, and final reports.
- Participate in and lead client meetings as appropriate.

Other support

- May occasionally participate in conversations with the wider Client Services team to discuss strategy, approach, and participation in other special projects.

How you work

- You have excellent organization, planning, and follow through.
- You are good at and enjoy distilling and presenting data to diverse stakeholders with varying levels of financial and accounting expertise.
- You are used to working with small, agile, remote, fast-moving, and sophisticated teams.
- It is easy for you to communicate clearly and succinctly both verbally and in writing.
- You are passionate about making a difference and supporting employee-owned businesses, and the idea of supporting small business owners is meaningful to you.

Your experience

- You have at least 2 years of financial analysis and / or accounting experience.
 - You are facile in an Excel or Google Sheets environment.
 - You have experience managing your own projects, meeting key milestones, and working across teams. Juggling multiple projects is not a problem for you.
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- You are familiar with multiple business sectors and have worked with or had exposure to small businesses.
- Ideally, you have experience working directly with clients to meet their unique needs.
- BA/BS required, MBA or advanced degree preferred.

Important notes about this role

1. You will work on projects on an as needed basis with a 1-2 week turnaround on each stage listed above. Turnaround will be determined by Project Equity needs and Analyst availability.
2. Each project will last approximately 3 months, varying slightly from project to project. We anticipate an average of 6 hours/week but no more than 10-12 hours/week.
3. The work can be done asynchronously (based on your schedule), with the exception of 1-2 hours of meetings per week.
4. You may choose to work on one or more projects concurrently depending on your capacity.

To apply

Please follow [THIS LINK](#) to apply. Upload your resume and cover letter. In your cover letter, please explain what motivates you to work with Project Equity, and how your experience, skills and commitment will advance our work to create a more equitable economy.

Learn more at www.project-equity.org.

Project Equity is an independent operating project of the nonprofit umbrella organization, Multiplier, a nationally recognized nonprofit with a growing portfolio of innovative initiatives that conserve and protect a sustainable and resilient world (www.multiplier.org)

Multiplier and Project Equity celebrate diversity and are committed to building teams and partnerships that represent a variety of backgrounds, perspectives, and skills. Multiplier and Project Equity are also committed to providing an environment of mutual respect that is free from discrimination and harassment. Multiplier and Project Equity prohibit discrimination in its governance, programs and activities on the basis of race, color, national

origin, age, disability, religion, gender, sexual orientation, gender identity, genetic information, political beliefs, reprisal, marital status, amnesty, status as a covered veteran, because all or part of an individual's income is derived from public assistance, or for any other non-merit based factor.