

# OPPORTUNITY: INVESTMENT BANKING ANALYST

## Organization:

CastleOak Securities, L.P. ("CastleOak") is a boutique investment bank focused on providing capital markets services to Fortune 500 and middle-market corporations, as well as large institutional investors and mid-tier investment managers. Our business areas consist of fixed income and equity sales & trading, debt and equity capital markets and financial advisory (including M&A and private placements). CastleOak is structured as a strategic partnership with Cantor Fitzgerald, & Co. ("Cantor"). CastleOak consists of professionals each with an average of 20 years of successful Wall Street experience and ongoing working relationships with some of the largest global corporations. We are an entrepreneurial group that demands and appreciates teamwork. Everyone, from Managing Director to first year Analyst, is expected to provide service to clients, support to colleagues, and energy towards new business development. CastleOak is based in New York City ([www.castleoaklp.com](http://www.castleoaklp.com)).

## Position Description:

The Investment Banking Analyst will be a critical part of the CastleOak team responsible for supporting Capital Markets, Investment Banking and Financial Advisory activities. The Analyst will work with senior officers and associates to perform the following assignments and tasks:

### Capital Markets

- Prepare weekly reports and assist with market updates
- Manage deal documentation and execution for Debt, Equity and Securitization underwritings
- Assist in issuer due diligence

### Investment Banking

- Company/Sector research
- Market analysis and research
- Pitchbooks & marketing support
- Support/Attend client meetings

### Financial Advisory

- Comparable company analyses
- M&A and Financial modeling
- Company valuations
- Industry/Sector Research

We offer a competitive salary and benefits package with an environment committed to professional growth.

## Qualifications:

We look for leaders and team players. We seek candidates who possess a track record of outstanding achievement in academics, employment, and personal endeavors. We want problem solvers, individuals who find opportunities in impossible scenarios. Previous investment banking experience is preferred (1-2 years), and analyst training experience is a plus. All applicants should have superior interpersonal and organizational skills and the ability to thrive in an entrepreneurial environment. Securities Industry Essentials (SIE) exam, Series 79 and 63 licenses.

## Additional Info:

*Location:* New York, NY

*% Travel:* 10-20%

*Work type:* Full-time

## How to Apply:

If you are interested in this opportunity, please submit your resume to CastleOak Securities, L.P. 110 East 59<sup>th</sup> Street, 2nd Floor, New York, NY 10022 (email: [LMcFadden@castleoaklp.com](mailto:LMcFadden@castleoaklp.com)).

REFERENCE THE JOB TITLE "INVESTMENT BANKING ANALYST" IN THE SUBJECT LINE OF YOUR E-MAIL.

Undergraduate GPA should be provided. CastleOak Securities, L.P. is an Equal Opportunity Employer.