

OPPORTUNITY: Senior INVESTMENT BANKING Officer

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 to a multi-tiered network of institutional investors and asset managers.

Our businesses include fixed income and equity sales & trading, debt and equity capital markets and financial advisory (including M&A and private placements). CastleOak is one of the nation's leading minority-owned and managed broker-dealers and is 100% employee owned. The CastleOak team is comprised 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 (www.castleoaklp.com) is headquartered in New York City, with regional offices in Atlanta, Cleveland, Los Angeles and Portland.

Position Description:

The Senior Investment Banking Officer will be a critical part of the CastleOak team responsible for business development and client relationship management, including the origination of capital markets and financial advisory business from existing and prospective corporate clients. The officer perform or manage the completion of the following processes: (i) generalist and sector client calling activities (ii) delivery of timely and relevant market, industry and/or transactional information (iii) coordination with capital markets/syndicate or financial advisory team on deal execution and on client communications (iv) research and evaluation of opportunities involving new financial products or government programs (v) participation in the firms business planning, reporting budgeting cycles. We offer a competitive salary and benefits package with an environment committed to professional growth.

Qualifications:

We seek candidates with proven track records of successful business development and client relationship management. Generalist capabilities are necessary; however concentration or specialization in one or more of the following sectors is particularly helpful: *consumer/retail, healthcare/pharmaceutical, technology/media/telecom, energy/utility, bank/financial*. Previous investment banking experience is required (5-10 or more years). Strong marketing and presentation skills along with the ability to perform or supervise analyst assignments involving financial modeling, valuation, market research, due diligence. Outstanding achievement in academics, employment, and personal endeavors. All applicants should have superior interpersonal, management and organizational capabilities, 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: 40 - 60%

Work type: Full-time

How to Apply:

If you are interested in this opportunity, please submit your resume via email jointly to:

mturner@castleoaklp.com rbacon@castleoaklp.com rhollinger@castleoaklp.com

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

CastleOak Securities, L.P. is an Equal Opportunity Employer.