



## Willamette Management Associates

Willamette Management Associates (WMA) seeks leadership-oriented professionals at the managing director level in our Chicago, Atlanta, and Portland offices.

### COMPANY OVERVIEW

Willamette Management Associates is recognized as a thought leader among business valuation, forensic analysis, and financial advisory services firms. Our firm specializes in business, debt and equity security, and intangible asset valuations for income tax, gift and estate tax, ESOP formation, business purchase/sale, fairness and solvency opinion, financing, bankruptcy, financial accounting, shareholder dispute, and commercial litigation purposes. WMA offers numerous career development opportunities:

- WMA is committed to making investments in both employee professional development and practice business development activities.
- WMA actively encourages firm members to participate in professional organization leadership roles, research and publications, conferencing and lecturing, and other professional development activities.
- WMA firm members have considerable freedom (and extraordinary business development resources) to develop and manage their own professional practices.
- WMA provides virtually unlimited opportunities for entrepreneurial practitioners to develop and manage a professional service line, including bankruptcy, property tax, gift and estate tax, income tax, and ESOP valuation services; transaction financial opinions; and breach of contract, shareholder rights, and tort litigation forensic analysis.

### SUMMARY OF RESPONSIBILITIES

Managing directors both sell and perform valuation, economic damages, and transfer price analyses across multiple industries and for various purposes. WMA seeks entrepreneurial executives to participate in new business development, service line management, and direct client service. Responsibilities are often more entrepreneurial than at other firms, providing self-motivated individuals with many opportunities to contribute to a dynamic and growing platform. Successful managing directors are assertive, motivated self-starters with the desire and potential to build and manage a professional practice.

### SPECIFIC RESPONSIBILITIES

- Manage engagement teams providing valuation, damages analysis, and financial advisory services to clients, including selecting and applying appropriate methodology,

writing opinions and reports, and supporting conclusions through audit, regulatory review, or litigation

- Develop and manage a service line, such as intellectual property analysis, economic damages analysis, shareholder dispute analysis, transfer price analysis, gift and estate tax valuations, income tax valuations, ESOP valuations, or fair value accounting analysis
- Proactively call on potential new clients by independently developing a network of referral sources
- Engage in various other practice development activities (including professional association leadership, conference presentations, and technical publication and scholarship)

## EXPERIENCE/SKILLS REQUIRED

- Minimum 10+ years of consulting experience
- Expert testimony experience required
- Expert proficiency in generally accepted analytical approaches and methods
- Management of complex valuation, damages, or transfer price analysis within a litigation context
- Strong analytical and problem solving skills, as well as strong verbal and written communication skills

## EDUCATION

- Masters degree in finance, accounting, or economics or MBA degree
- Active CPA and/or CFA or related professional credential

## COMPENSATION

Compensation is highly competitive and negotiable, given candidate credentials and background

At WMA, you will be part of a learning culture, where excellence is rewarded and diversity is respected and valued. We offer flexible career progression that allows for a variety of challenging opportunities throughout your career. WMA is all about our people, encouraging high performance and quality. We offer the opportunity to work with the thought leaders in the business valuation profession. For more information, please contact [Employment@willamette.com](mailto:Employment@willamette.com). No phone calls please.