

MANAGER, VALUATIONS & LITIGATION SUPPORT

Windsor, Ontario _____ January 2024

Who We Are

Capital Assist (Valuation) Inc. (“CAV”) is a leading, independent business and transaction advisory practice in Windsor, Ontario established to assist clients in a broad range of services, including business valuation, litigation support, transaction advisory (mergers and acquisitions), management consulting and CFO services.

We are the only boutique advisory firm in the region (you don’t need to move to Toronto to get involved in this specialty type of work!). We serve clients all across Canada in a range of size and industries including private companies, publicly traded companies, governments, institutions and their professional advisors.

We are building a thriving organization and aim at creating a lasting legacy in the communities that we serve. We have a diverse team that is energized and supports each other. Team members hold a variety of professional designations, including CPAs, CBVs, CFAs, MBAs, and other qualifications. As a speciality firm, we offer a professional environment, and a great place to learn and advance your career. Everyone at CAV is a part of the team and is actively involved in various aspects of the organization.




Capital Assist has experienced significant growth in recent years through organic expansion of the service lines, and the addition of new team members, culminating in a recent expansion of our office. The high quality of services provided to our clients, driven by our committed team, has allowed us to compete with and outperform the largest recognized accounting and advisory firms. As we continue our growth trajectory, we will continue to develop our team members into future leaders of the firm; come join us!





To learn more about our company, please visit our website, www.capitalassist.ca

The Opportunity




We are seeking a motivated and high-performing individual to join our growing team in the role of Manager, Valuations & Litigation Support. This position is ideal for individuals who are passionate about finance, accounting, and law.

The Manager will be reporting directly to the Partners and will be responsible to help manage and lead the valuation and litigation practice of the firm, playing an integral role within the team by supporting and managing various aspects of the engagement. The Manager will be involved in the following focus areas of the advisory practice:

-  Business valuations;
-  Economic loss and damage quantification;
-  Financial due diligence;











-  Forensic accounting and litigation support;
-  Valuation for financial statements reporting (e.g., intangible, purchase price allocation);
-  Strategic and financial consulting; and,
-  Financial modeling.




CAV offers its staff members the unique opportunity to experience other service lines of the firm to expand their knowledge, including, but not limited to:

-  Mergers, acquisitions, divestitures and other transaction advisory;
-  CFO services and management advisory; and,
-  Tax advisory.

Role, Key Responsibilities, and Day-to-Day Tasks






Within the advisory team, the responsibilities of the Manager will include the following:

-  Preparation and review of engagement proposals, and responsible for the engagement scope, framework, planning and budgeting;
-  Management of timelines, budgets, and work flow capacity planning;
-  Preparation and oversight of information requests, and management of documents received;
-  Lead team members in executing on and preparing client deliverables including identifying key issues, providing guidance on the qualitative and quantitative analysis of accounting and various financial data in the assignment, and make recommendations on client issues ;
-  Review financial, legal, and corporate documents;
-  Responsible for preparation and review of schedules and buildout of models for valuations and economic loss quantifications;
-  Conduct valuation-related research, including but not limited to industry-specific information, macroeconomic data, precedent transactions and public company valuation multiples;
-  Review of case law for valuation and loss quantification precedence;
-  Responsible for preparation, review and execution of business valuation and expert reports (e.g., quantification of economic damages, family law reports);
-  Review and critique upon other professionals' reports;

-  Regular communication with the Partners and other professional staff on the engagement, regarding the overall file status and management, including but not limited to the progression of the deliverables, job hours and fee monitoring;
-  Communication with clients, and their counsel and advisors, throughout the course of an assignment. This communication includes attending and participating in client meetings and discussions, written correspondence, and follow-ups;
-  Assistance with quality control review comprising of overviewing the preparation of completion documents to “close-out” files in an efficient manner, and in accordance with professional practice standards;
-  Participation in the development and delivery of training, process improvement and professional development programs; and,
-  Mentor, train, and assist in the development of professional staff;
-  Proactively engage in new business and opportunities development promoting the firm’s expertise and services.


Candidates Credentials

Interested candidates shall possess the following qualifications:













-  Bachelor’s degree in accounting, finance, or related area of study;
-  A Chartered Business Valuator (CBV) professional designation (or substantial completion) with 4+ years of relevant business valuation/litigation support related experience (or exposure to similar mandates);
-  2+ years of managerial experience is strongly preferred;
-  Other accounting and/or finance professional designations (CPA and/or CFA) would be an asset. An interest in pursuing other certifications (e.g., MBA, CBV, CFF and/or CFE designation) will be viewed positively;
-  Strong track record of personal growth, client relations and service, and file management in a fast-paced environment.

Ideal Skills and Attributes of the Candidate

Interested candidates should possess the following attributes:

-  Ability to set priorities, manage competing demands, oversee the work of students and other junior practitioners, and possesses excellent self-discipline and organizational skills. Candidates must also

have the ability to maintain professional composure in high-stress situations to meet tight deadlines and resolve issues;

-  Solid investigative skills and attention to detail;
-  Ability to analyze, understand, and interpret financial statements and other accounting data;
-  Ability to coach and mentor junior practitioners to their highest potential and act as a role model;
-  Strong verbal and written communication and interpersonal skills, such as being comfortable communicating with clients to request and present information, as well as respond effectively to questions, conscious of client relations and expectations;
-  Ability to write clear and concise reports, communications and other materials, and ability to effectively present information in schedules;
-  Ability to think creatively and provide practical solutions to complex problems. Candidates must possess strong analytical skills, research capabilities, as well as strong business acumen;
-  Detail-oriented, highly organized with exceptional documentation and record keeping abilities;
-  Ability to work well both autonomously and collaborate in a team environment (including both internal and external parties);
-  Positive attitude, strong work ethic, open to feedback and have a desire to be a team player in a collaborative and fun team environment;
-  Entrepreneurial mindset, be self-motivated, and committed to professional growth through continuous learning;
-  Demonstrates interest, enthusiasm and ambition to further grow as a leader in the firm, including the development and recommendation of best practices within the team, suggestions for marketing initiatives to promote the firm's expertise and services, and generate other ideas and solutions; and,
-  Proficiency in Word, Excel and PowerPoint.

Why Choose Capital Assist

Capital Assist is a multi-disciplinary group of companies which leverages the unique skills and experience of its team to deliver comprehensive, sound advice to its clients. The organization comprises of CAV, focused on business valuation, litigation support and transaction advisory services, and Capital Assist Professional Corporation (“CAPC”), an accounting, assurance and taxation advisory practice to help meet all of the financial goals and objectives of its diverse client base.

At Capital Assist, you will have the opportunity to work with highly experienced partners and other senior staff members who value mentorship and consider training to be an integral part of their role. You will be exposed to diverse work opportunities and tailormade solutions to client issues; we often say that “no day is the same”.

We care about our employees’ professional growth and development, as demonstrated by our commitment to reimburse annual professional dues and costs to achieve professional designations such as the CBV. We encourage staff to undertake opportunities for professional development to enhance their experience, technical knowledge and professional skills.

Our collaborative team supports your success and welcomes your ideas and ambitions; in fact, your contribution will be appreciated from the very beginning. You can anticipate active engagement with clients and their professional advisors from the outset. Further, we offer excellent career advancement and progression opportunities.

At Capital Assist, the compensation package is designed to reward success. Details regarding compensation will be based on the successful candidate’s knowledge, skills, and experience.

We are looking to add a colleague who will be committed and will grow with the firm and be part of our legacy. If this is appealing to you, consider joining us!

Location and Working Conditions

We believe that it is beneficial for employees to attend the office in person to boost human connections, collaboration and mentorship between team members as well as spur employee growth and professional development. We provide optimal workspaces to maximize comfort and productivity, including but not limited to standing desks.

Our office is located at 2558 Dougall Avenue, Windsor, Ontario N8X 1T6. On-site parking is available.

For candidates applying from outside of Essex County, Capital Assist supports flexible work arrangements on a case-by-case basis. The Manager, as other team members, may work additional hours throughout the year, beyond the standard hours, to assist the firm meeting its objectives and fulfilling client’s expectations, as required.

How to Apply:

If you are interested in joining our advisory team and meet the requirements for the position, please forward your resume, cover letter, and transcripts through our website and complete the form at www.capitalassist.ca/careers/. Please note that multiple positions may be open, and we encourage to review the various openings for the best fit.

Submit your resume to the attention of Ms. Sabrina Nazzani, Partner.

Resumes will be held in the strictest of confidence. While all resumes will be reviewed, only those candidates selected for interviews will be contacted.