



Senior Associate / Associate Role



Location: Atlanta, GA

COMPANY DESCRIPTION

o15 Capital Partners (“o15”) is a, alternatives investment firm with a mission to provide growth capital to companies led by and serving underrepresented entrepreneurs and communities. We seek to invest opportunistically in private credit and equity tranches of lower-middle-market companies in the U.S.

ROLE

The Senior Associate/Associate role will support all aspects of the private credit and equity investment process, from sourcing to diligence and underwriting, structuring, and portfolio management. The Associate will also support ad hoc projects including impact/ESG reporting, marketing, and limited partner communications, among others.



RESPONSIBILITIES

- Evaluate potential investment opportunities through rigorous financial analysis, market research, and strategic assessments to drive informed investment decisions
- Evaluate and independently form and justify a view on the transaction credit quality and appropriate lending structure
- Work directly with senior investment professionals on transaction due diligence (including financial, commercial, operational, and legal) and execution
- Prepare investment committee materials, including investment memorandums
- Support the deal sourcing and screening effort
- Participate in weekly investment committee meetings and provide support for key deliverables
- Assist in the management and monitoring of portfolio companies, including the execution of follow-on investments, assistance with corporate finance and operational initiatives, and quarterly valuations
- Assist in the development of marketing materials and communications to limited partners, co-investors and debt providers
- Support ad hoc projects



QUALIFICATIONS

- Highly motivated and enthusiastic individual; strong interest and passion for investing
- Bachelor’s degree, although MBA and/or CPA designation is preferred but not required
- Minimum of 2-5 years credit experience. Work in private credit, commercial banking, investment banking, and / or private equity preferred
- Experience working in the Healthcare, Education, and Technology and Business Services sectors preferred, but not required
- Experience and knowledge with ESG investing preferred
- Strong financial modelling, analytical and quantitative skills; strong understanding of debt and equity capital structures
- Advanced understanding of Excel and strong modeling capabilities
- Excellent written and oral presentation skills
- Solid foundation of global accounting standards
- Strong business orientation, able to proactively engage transaction counterparties and investor clients
- Excellent customer orientation
- Intellectual curiosity
- Strong planning & organizing skills
- Resourceful self-starter, able to work autonomously and as a team player.
- Must be able to travel domestically up to 20%



COMPENSATION & BENEFITS

- Salary: TBD
- Bonus: TBD
- Health, dental, vision, and life insurance plans
- 401(k) Savings Plan – with generous company matching contributions
- Paid time off – including days paid time off, [nine] paid company holidays
- Flexible hybrid work-from-home model