Job Title: Associate – Financial Services

Location: Hybrid – Charlotte, NC; Denver, CO

Employment Type: Full-Time

Salary: Base Salary $80,000-$120,000; Variable Compensation: This role is eligible for commission based on closed revenue/delivered revenue; Variable Compensation target is $40,000 – $60,000

About Us

We're a rapidly growing technology-enabled services startup powering digital transformation for financial services organizations. Our mission is to streamline business operations through secure, efficient software solutions tailored to the evolving financial services sector.

Role Overview

As an associate consultant you will be supporting client engagements by helping analyze client business needs, configure and test technology solutions, and advising on data migrations. You will work with clients in the financial services sector (private equity firms, investment banks, multi-strategy asset managers, venture firms). Your work will enable clients to successfully deploy, optimize, and adopt technology platforms.

You'll support the entire project lifecycle, including client requirement validation, process analysis/optimization, technical configuration, testing, change management/training, and post-launch support.

You'll operate as the main point-of-contact for key clients. You will manage multi-resource project teams for larger/enterprise clients of LEDA Group. You'll be accountable for delegation and quality of deliverables produced by more junior team members, and ultimate successful delivery of client projects and outcomes.

You'll have the opportunity to pitch new business, own the drafting and delivery of Statements of Work (SOWs), and take an active role in client engagement business development activities (conferences, roundtables, LEDA-sponsored events, etc.).

You'll report directly into LEDA Group's Founder.

Key Responsibilities:

- Act as main point-of-contact for clients on high-priority enterprise engagements.
- Manage junior resources assigned to client projects; take accountability for QA of deliverables produced by junior resources; provide mentorship and training for internal team members.
- Validate client requirements that underpin their financial technology transformation goals.
- Oversee configuration and integration work to enable the technical deployment of SaaS platforms; other custom tools (example: DealCloud).
- Oversee the implementation of iterative feedback from clients and execute the related configuration work within the technology.
- Oversee/validate data migration activities (cleansing, normalization, de-duplication) to enable a successful rollout of new technology for clients.
- Develop and maintain documentation, training guides, client onboarding materials.
- Facilitate ongoing end-user support following the technical deployments.

- Collaborate with various client stakeholders (investment professionals, IT/support team members, market professionals, executive assistants) to ensure smooth product + project delivery.
- Maintain up-to-date knowledge of relevant financial software, design and process automation best practices, and data security requirements.

Key Qualifications:

- Bachelor's degree in business, finance, economics, information systems, or related fields.
- 3 to 5 years of professional experience in consulting, finance, technology, or related fields.
- Strong analytical thinking and problem-solving skills.
- Excellent written and verbal communication skills, including the ability to simplify technical concepts for non-technical stakeholders.
- Willingness to learn new technologies and adapt to changing client needs.
- Teamwork, work collaboratively with others to achieve group goals and drive business results.
- Basic project management skills.

Preferred Skills:

- Experience or familiarity with CRM / deal management platform, DealCloud.
- Basic knowledge of data analytics, database principles, and related tools (Excel required, SQL optional).
- Exposure to leading financial services clients through technology transformation / modernization projects.

This role targets candidates passionate about the intersection of finance and technology, with potential for rapid skill development and direct client interaction from day one.