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INVESTMENT BANKING VICE PRESIDENT in Finance & Technology (Insurance & Capital Markets)

DESCRIPTION

Evolve Capital Partners ("Evolve") provides investment banking advisory to leading entrepreneurial businesses operating at the intersection of technology-enabled solutions and financial services. Our core coverage verticals include Insurance and Capital Markets.

We are currently seeking to recruit an Investment Banking Vice President to cover the Insurance and Capital Markets verticals from our New York City office. The Vice President role provides an unparalleled opportunity to work as part of a nimble deal team executing M&A and strategic advisory mandates while building out coverage initiatives across our verticals.

Evolve offers a unique and collaborative work environment, where top performers are highly valued for initiative, creativity, maturity, and enthusiasm for learning. We provide an exceptional path for career growth, along with strong and competitive compensation.

BACKGROUND ON EVOLVE & THE OPPORTUNITY

Evolve

Evolve Capital Partners ("Evolve") is a growing investment bank focused exclusively on entrepreneurial businesses operating at the intersection of technology-enabled solutions and financial services. Our primary coverage verticals include Insurance and Capital Markets, where we advise technology-enabled service and software companies.

As an independent investment bank, Evolve advises on mergers and acquisitions, divestitures, capital raises, and financial restructurings. We dispense bespoke and mission-critical advice in a creative environment generating optimal outcomes. Our clients are leading entrepreneurial-run firms who turn to Evolve for strategic advisory. Furthermore, we support the ecosystem with exclusive research and valuable industry insights through our publications.

With over 50 engagements executed by its leaders, Evolve has served as a proud partner, bringing valuable advisory to both investors and emerging companies. We are based in New York, NY and the Evolve brand was established in 2017.

Why the Evolve Opportunity?

Evolve is a growing platform that presents a unique opportunity for a driven and entrepreneurial individual to build out their coverage and contribute to transactions. The career advancement is significant from being an early member of our close-knit and growing team.

Our environment is flat and non-bureaucratic, allowing for efficient decision-making to generate optimal outcomes (financially and personally) for both our clients and us. We provide a superb career path, in addition to strong and competitive compensation. We fully encourage the use of technology, including AI-powered tools, in our day-to-day work environment.

ROLE SPECIFICS

The Investment Banking Vice President will carry responsibility across deal execution and business development. On the execution side, the VP will lead transaction processes, manage client deliverables, and serve as the primary day-to-day contact on active engagements. On the

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origination side, the VP will proactively cultivate relationships with prospective clients, including privately-held business owners and private equity firms, and contribute to building the firm's deal pipeline.

The Vice President will serve as a key contact for select client relationships and is expected to attend and lead client meetings, contribute to marketing efforts, and mentor junior team members. The ideal candidate will have relevant experience executing transactions in the middle market with tech-enabled services or software firms.

Our environment is collaborative, demanding, fast-paced, and highly entrepreneurial.

PRIMARY RESPONSIBILITIES

- Lead transaction processes for sell-side and buy-side engagements, including overseeing the preparation of marketing materials, managing due diligence, and running buyer/investor meetings.
- Proactively originate new business by building relationships with privately-held business owners, private equity firms, and strategic acquirers in our coverage verticals.
- Develop and maintain a pipeline of prospective client engagements and contribute to the firm's business development strategy.
- Prepare and deliver new business development presentations for prospective sell-side and buy-side mandates.
- Assist with buy-side efforts for our strategic and private equity accounts.
- Write and oversee research and thought leadership to demonstrate sector and practice expertise.
- Drive recruiting, training, and development of junior investment banking team members.
- Oversee project management of internal and client-facing deliverables.
- Leverage AI-powered tools and technology platforms to drive efficiency across deal execution, research, and business development.
- Generate actionable items for deal execution or business development matters in a timely manner as directed by leadership.

QUALIFICATIONS

- 5 to 10 years of investment banking, M&A advisory, or equivalent financial advisory experience.
- MBA from a top-tier program or other relevant graduate degree is highly desirable but not required.
- Proven transaction experience with tech-enabled services or software firms, ideally in Insurance, Capital Markets, or related financial services verticals is highly desirable but not required.
- Demonstrated ability (or desire) to originate and develop new client relationships.
- Excellent technical proficiency across all aspects of financial analysis and modeling.
- Proven ability to lead client meetings and build strong, influential relationships with C-suite executives.
- Highly effective writing skills to support the creation and delivery of presentations to client management teams, as well as buyers and investors.
- Experience managing and mentoring junior bankers.
- Self-starter with the ability to learn and work in a fast-paced, challenging environment.
- Proficiency with financial data platforms (e.g., Capital IQ, PitchBook) and productivity tools (e.g., Salesforce, Microsoft 365).

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- Familiarity with AI tools (e.g., Claude, ChatGPT) and a willingness to integrate technology into daily workflows.
- International candidates with proper work authorization by start date will be considered.

COMPENSATION & BENEFITS

We offer strong and competitive compensation. Standard benefits include:

- 401K participation with profit-sharing
- Health insurance
- Paid time off

Interested candidates should send a resume to recruiting@evolve-capital.com and include the job title in the subject line. Also, attach an informal cover letter describing your background and why you are a fit for the role. Limit the cover letter to no more than a few paragraphs.

International candidates are considered, and visa sponsorship is available for the right candidate.

All candidates will be subject to passing criminal and background checks.

Evolve Capital Partners Inc. is committed to providing equal opportunities in employment. We will not discriminate between applications for reason of gender, race, religion, color, nationality, ethnic origin, sexual orientation, marital status, age, employment status, veteran status, or disability.