



**Job Title:**

Vice President

**Location:**

Wayne, PA

**Position Overview:**

The Vice President (VP) will be a key member of the Deal Team, responsible for leading deal sourcing, executing transactions, and working closely with portfolio companies post-investment. This role requires strategic thinking, financial expertise, and strong leadership skills. The VP will also manage junior team members and collaborate with external advisors to support the firm's investment strategy.

**Key Responsibilities:**

**Deal Origination & Sourcing:**

- Identify and develop new investment opportunities through networking, conferences, and intermediary relationships.
- Collaborate with industry experts to develop sector-specific investment theses.
- Maintain and leverage a network of investment bankers, advisors, and other intermediaries.

**Transaction Execution:**

- Lead and coordinate the deal process from diligence to closing, including financial modeling, valuation, and negotiation.
- Perform in-depth analysis of financial statements, industry trends, and market dynamics.
- Manage relationships with legal, tax, and financial advisors during the execution process.
- Oversee the preparation of investment committee materials and present findings to senior leadership.

**Portfolio Company Management:**

- Work closely with portfolio companies to drive growth, operational improvement, and strategic initiatives.
- Monitor key performance indicators (KPIs) and financial performance across portfolio companies.
- Support exit strategies through preparation for sale, IPO, or strategic partnership.

**Team Leadership:**

- Mentor and develop Analysts and Associates on the deal team.
- Collaborate with internal teams (investor relations, finance, legal) to align strategy and processes.

**Deal Pipeline Management**

- Maintain a robust pipeline of potential investment opportunities and prioritize resources accordingly.
- Maintain relationships with industry experts, advisors, and potential management teams.
- Develop and expand industry knowledge to aid in deal flow.

## Qualifications:

### Education:

- Bachelor's degree in Finance, Economics, or a related field; MBA or CFA preferred.

### Experience:

- 7-10 years of relevant experience, with 3+ years in private equity and 2+ years in investment banking, strategy consulting, or transaction advisory services.
- LMM or MM private equity experience essential.
- Proven track record of leading transactions, including M&A, leveraged buyouts, and growth equity investments.
- Strong financial modeling, valuation, and analytical skills.

### Skills:

- Excellent negotiation and communication skills, with the ability to influence both internal and external stakeholders.
- Ability to manage multiple projects simultaneously and perform under pressure.
- Strong leadership and mentoring abilities.
- Knowledge of relevant industries (e.g., healthcare, technology, consumer, industrials) is a plus.

## Additional Firm Information

[Inverness Graham](#) is a lower middle-market private equity firm focused on control-oriented buyouts of founder-owned businesses with revenues between \$20-100 million. The firm has raised over \$1 billion across multiple funds and primarily serves as the first institutional capital in these businesses. The firm is located just outside Philadelphia, PA. Visit their [LinkedIn page](#) for more information.

### Firm makeup

- Headquartered just outside Philadelphia in Wayne, PA.
- Founded in 2003
- **Overall Team:** Approximately 40 employees, with half on the investment side and the rest in portfolio operations and support roles.
- **Investment Team:** 5 Managing Principals, 3 Principals, 2 VP, 2 Senior Associate, 2 Associates, and 4 analysts split across 2 funds.
- **Portfolio Operations:** The value creation group focuses on building teams, implementing systems, and driving operational improvements across ~12 portfolio companies. The firm has a strong operating and value creation team that is integral to its legacy and deal success.
- **Office Environment:** Modern, top-tier office space built post-COVID, providing a collaborative and dynamic work environment.

- **Family Office Culture:** Despite being largely a raised fund from institutional investors, Inverness Graham maintains a family office-like culture due to its affiliation with the Graham Group.
- **Overall Culture:** Described as collegial and supportive, with a focus on teamwork and personal growth.
- **Internal Mobility:** The firm has a strong culture of promoting internally, with many senior team members having started as Analysts. This highlights a focus on long-term career development.
- **Hybrid Model:** 4 days in-office (Monday to Thursday) with optional work-from-home Fridays. Fridays are flexible, but deal teams should be informed if a team member is working remotely, especially if a live deal is in progress. During busy periods, associates may be required to be in the office unless pre-arranged.

## Funds and strategy

- **Investment Strategies:**
  - Flagship Fund: Focused on buy-and-build deals in technology, niche manufacturing, and medical sectors. Currently raising their 5th fund, targeting \$500-\$600 million, following a successful ~\$420 million 4th fund.
  - Green Light Strategy: A new sustainability-focused buyout fund with over \$200 million. This strategy addresses a gap in the market for returns-driven ESG investments.
- **Active Portfolio:** ~10-14 companies
- **EV of Portcos:** \$30-\$300M
- **Investment Criteria:** LMM
- **Investment size:** \$10-75M
- **Preferred Company Valuation:** \$20-100M
- **Preferred Company Revenue:** \$15M+
- **Preferred EBITDA:** \$3-20M
- **Sector Focus:** medical device manufacturing, IT and data management, Human Capital management, knowledge & learning, medical and dental consumables, lab and biopharma consumables; New Greenlight Fund focuses on AgTech transition, energy transition, industrial transition and built world transition sectors.

## Senior Leadership

[Aliya Khaydarova](#) – Managing Principal

[Sean Dougherty](#) – Principal

[Chris Frystock](#) - Principal

## In the News

[Inverness Graham-Backed BenefitHub Acquires Abenity, Enhances Employee Perks and Voluntary Benefits Offerings](#)

[Inverness Graham Announces Majority Recapitalization of My Yield](#)

[Inverness Graham Announces the Sale of Swipeclock](#)