Associate, Investments & Finance

About Neil Capital

Neil Capital is a Toronto-based principal investment firm focused on investing in and building businesses, primarily in financial services.

We invest our own capital alongside that of our partners and work closely with management teams to develop businesses over the long term. Our activities include principal investing, company formation, mergers and acquisitions, financing, strategic development and governance.

Our portfolio includes businesses operating in insurance, employee benefits, financial technology and healthcare services. We are also pursuing opportunities to establish new businesses and investment platforms in insurance services and specialty finance.

Neil Capital is entering its next phase of development and is seeking an Associate, Investments & Finance to join its growing team.

The Opportunity

The Associate will work directly with Neil Capital's founder across the firm's existing investments, new business initiatives and internal financial operations.

This is a broad, hands-on position combining financial analysis, transaction execution, portfolio-company support and business development. The successful candidate will help develop and implement financial and operating processes at Neil Capital and its portfolio companies, support the formation of new businesses, and participate in evaluating and executing investments and acquisitions.

Key Responsibilities

Portfolio Company Finance and Development

- Work with portfolio-company management teams on financial reporting, budgeting, forecasting and business planning.
- Develop financial models, operating forecasts and performance dashboards; analyze profitability, unit economics and cash flow.
- Support acquisitions, financings, strategic initiatives and special projects.
- Improve financial reporting systems and internal processes; coordinate execution with management and external advisers.

New Business and Investment Platform Formation

- Support the establishment and development of new businesses, particularly in insurance and specialty finance.
- Prepare business plans, financial models, operating budgets and capital requirements analyses.
- Evaluate business models, market opportunities, transaction structures and financing alternatives.
- Help establish accounting, reporting and operational processes for new businesses.
- Manage implementation plans and workstreams involving commercial partners, management teams and professional advisers.
- Support capital raising and materials for prospective investors, lenders and strategic partners.

Neil Capital Finance and Internal Operations

- Maintain investment records, including capital contributions, distributions, valuations and investment performance.
- Prepare portfolio-level financial analysis, NAV reporting and investor materials.
- Develop internal processes; support liquidity management and capital allocation.

Investment Analysis and Transaction Execution

- Evaluate investment and acquisition opportunities through financial due diligence, valuation and commercial analysis.
- Prepare financial models, investment memoranda and transaction presentations.
- Analyze acquisition financing, capital structures and potential returns.
- Support negotiations, diligence and execution, coordinating with legal, accounting, tax and other advisers.

Candidate Profile

- Approximately 3–6 years of relevant experience, preferably in Deals, Transaction Advisory or Corporate Finance
- Experience in the Financial Services sector an asset, ideally involving insurance, lending, financial institutions, asset management or related businesses.
- Experience in financial due diligence, quality-of-earnings analysis, valuation, financial modelling or transaction execution.
- Strong Excel skills and experience analyzing privately held businesses.
- Excellent organizational and project-management skills, including the ability to manage multiple workstreams independently.
- Clear communication skills, sound commercial judgment, intellectual curiosity and an entrepreneurial mindset.
- Comfort with a small organization and with both strategic assignments and hands-on accounting and financial work.

Why Join Neil Capital?

This position offers the opportunity to join a growing principal investment firm as the first professional hire. You will move beyond traditional professional advisory work and become an investor and business builder.

- Work directly with an experienced private equity professional and principal investor.
- Gain exposure to investment decisions, acquisitions, financing and business formation.
- Work closely with founders, CEOs, investors, lenders and other senior business leaders.
- Assume meaningful responsibility for financial and strategic initiatives across portfolio companies.
- Help build the internal infrastructure of a growing principal investment firm.

The role offers substantial responsibility, direct exposure to senior decision-makers and opportunities for professional growth as Neil Capital expands.

If you are interested, please forward a copy of your resume to Romy Elias – romy@collinsexecutivesearch.com. All inquiries will be kept strictly confidential.