



**Summer Associate  
&  
Summer Analyst Program**



**Specialist Private Equity Firm  
Since 2010**

Scottsdale, AZ | Philadelphia, PA

*[estanciapartners.com](http://estanciapartners.com)*

# A DEEPLY EXPERIENCED PE FIRM WITH A PURPOSE-DRIVEN CULTURE

## *A Sector Specialist Leader*

We are a Private Equity firm focused on investing in financial services companies with durable, capital-light business models across multiple funds.

## *National Presence*

We are headquartered in Scottsdale, Arizona, with an office in Philadelphia, PA and portfolio companies located across the United States, Canada, and United Kingdom.

## *Limited Partners*

Our diverse Limited Partners and investor base includes some of the largest public and private pension funds, insurance companies, banks, foundations/endowments, and ultra/high net worth individuals.

## *Industry Leaders*

We represent over 130 years of cumulative investment and operating experience in financial services with over \$1.5 billion in invested capital.

## ***Estancia Capital Partners is a leading financial services focused private equity firm***

We offer an advanced and challenging work environment commensurate with our institutional client base and the advantages of a being a boutique management firm. We offer a unique and attractive work environment that fosters learning and professional development.

## ***Competitive Employee Benefits***

- ✓ Generous medical, dental and vision benefits
- ✓ Paid time off
- ✓ Training & tuition reimbursement opportunity
- ✓ 401(k) plan



## **Best Talent, Great Schools**

### ***Team Members attended:***

Arizona State University  
Barnard College  
Columbia University  
Fairfield University  
NC State  
San Jose State University  
University of Arizona  
University of Pennsylvania  
University of Southern California  
University of Redlands  
Wagner College

***“Comprehensive exposure to all facets of the private equity business, and I was thrilled with the tangible, direct contributions I was able to make!”***

***- 2022 Summer Associate***

## OPPORTUNITIES AT ESTANCIA CAPITAL PARTNERS

### The Summer Associate Program for MBA and active graduate students

**Our full-time Associate Program draws upon graduates from top academic universities. Associates benefit from:**

- ✓ A robust and extensive training program
- ✓ Ongoing professional learning and development opportunities
- ✓ Responsibilities that provide meaningful contributions to the firm
- ✓ Formal mentorship through the Estancia Connect program
- ✓ Relevant industry expertise
- ✓ Valuable learning experience – fostering professional growth
- ✓ A culture that promotes community involvement

### The Summer Analyst Program for undergraduate college students

**Our Summer Internship Program is typically 10 weeks long and targets rising seniors. Analysts benefit from:**

- ✓ Meaningful work that serves as a realistic preview of the full-time Associate Program
- ✓ Senior Partner open door culture and exposure through “Lunch and Learn” series
- ✓ Exposure to departments across the firm through overviews and meeting participation
- ✓ Pairing with an Associate who serves as a coach and mentor throughout the program

<b>Program</b>	<b>Weeks 1 - 4</b>	<b>Weeks 5 - 8</b>	<b>Weeks 9 - 12</b>
<b>Summer Associate</b>	<ul style="list-style-type: none"><li>• Introduction to the “Estancia Way”</li><li>• Familiarization with financial services verticals</li><li>• Join deal team on new opportunity</li><li>• Identify themes/industry topic for SWOT report</li></ul>	<ul style="list-style-type: none"><li>• Participate in monthly and quarterly board calls with 1 – 2 portfolio companies</li><li>• Preliminary modeling on new investment opportunities – present to deal team</li><li>• Exposure to fundraising and servicing existing LPs</li></ul>	<ul style="list-style-type: none"><li>• Preparation and presentation of portfolio company valuation to investment team lead</li><li>• Assistance with portfolio reporting in LP quarterly letter</li><li>• Presentation of themes/ industry SWOT report</li></ul>
<b>Summer Analyst</b>	<ul style="list-style-type: none"><li>• Introduction to the “Estancia Way”</li><li>• Familiarization with financial services vertical</li><li>• Completion of LBO Modeling Course</li><li>• Identify themes/industry topic for SWOT report</li></ul>	<ul style="list-style-type: none"><li>• Participate in monthly and quarterly board call with identified portfolio company</li><li>• Assist with P&amp;L analysis for financial modeling for new investment opportunity</li><li>• Exposure to fundraising and servicing existing LPs</li></ul>	<ul style="list-style-type: none"><li>• Participation in quarterly valuation review</li><li>• Assistance with portfolio reporting in LP quarterly letter</li><li>• Presentation of themes/ industry SWOT report</li></ul>



## ACTIVE PORTFOLIO COMPANY EXPOSURE

During the summer program, you will have the ability to join investment deal team(s) on new investment opportunities. Preliminary modeling, due diligence review and participation in key meetings are vital to potential investments. Past Estancia Analysts and Associates have assisted deal teams with the following closed transactions, by example:

### *Product Manufacturing*



### *Front/ Middle/ Back Office Technology*



**PMA**<sup>TM</sup>

### *Outsourced Administration and Digitization & Automation*



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### *Financial Advisory/Planning*



## COMMITMENT TO DIVERSITY AND INCLUSION

As a Minority Business Enterprise (MBE), fostering a community of diversity and inclusion is one of our core values and part of our overall investment philosophy. This is evident by the fact that over half of our workforce is comprised of women and/or ethnically diverse employees. We strive to create a positive workplace by promoting collaboration, acceptance and inclusion of all team members, and provide employees with access to a wide range of people and experiences to foster connections, learning, and development in a cohort-based mentorship program.



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