

Established in 2007, Catalina Holdings (Bermuda) Ltd. is a successful consolidator of businesses and portfolios in run-off within the insurance and reinsurance sector. Catalina has acquired liabilities in excess of \$10 billion through 31 transactions and expects to continue to grow rapidly over the next few years. Catalina maintains a head office in Bermuda as well as offices in U.S., U.K., Ireland and Singapore.

Mergers & Acquisitions and Financial Planning & Analysis Associate

The Mergers & Acquisitions and Financial Planning & Analysis Associate reports directly to the M&A Director. The candidate will support the M&A team on deal sourcing, due diligence, execution and transaction financing. Additionally they will assist in the build out of the business planning, performance reporting and analysis capabilities of the company.

Key Duties and Responsibilities:

In relation to the Mergers & Acquisitions team:

- Evaluating new acquisitions, including preparation of financial models and investment analysis memos
- Support deal sourcing with the understanding of the strategy and the insurance industry, properly identifying and communicating with potentially relevant target companies.
- Assist with all aspects of the transaction due diligence.
- Assist in the acquisition information and approval requirements of the Exco, shareholders and Boards.
- Supporting with transaction documentation requirements.
- Ensure M&A and underwriting processes are properly followed
- Ensure the transaction handover process from the M&A to operational teams is properly followed
- From time to time, the candidate may also assist senior management on various group related projects.

In relation to the Financial Planning & Analysis team:

- Assist in the company-wide financial planning and analytical processes and implementing processes and models.
- Strategic and operational planning including business planning, forecasting and proforma financial projections of new transactions.
- Preparation of profitability reporting and analysis for each completed transaction.
- Support the preparation of management and board presentations.
- Participate in the execution of relevant finance projects as well as recommend and implement improvements.

Candidate Competencies and Qualifications

- CPA, MBA, CFA and/or similar professional designation is preferred.
- Minimum 3-5 years' experience in insurance and/or reinsurance industry required.
- High degree of financial acumen, good understanding of insurance financial statements and of insurance business generally.
- Experience analysing insurance business through audit, transaction services, or similar.
- Inquisitive and analytical approach to their work, with ambition to add value to and grow within an organisation.
- Team player, ability to work as part of a multi-disciplinary team, often under time pressure, to achieve shared goals.
- The inclination to seek and analyze data from a variety of sources to support decisions and to align others with the organization's overall strategy.
- Experience with financial modeling/pricing, due diligence reviews and integration of M&A and reinsurance transactions

All suitably qualified and interested candidates, should submit their interest in writing with a Cover Letter and CV to:

HR-BDA@Catalinare.com
Catalina Holdings (Bermuda)
Ltd.

CLOSING DATE
February 1st, 2023

ONE CATALINA

At Catalina, we believe that diversity and inclusion are critical to our business success. Our Catalina Flight Plan embeds the core values in our everyday work practices through: Integrity, Expertise, Collaboration, Empowerment, Drive and Agility, all of which fosters our unique environment.

Catalina is an Equal Opportunity Employer and does not discriminate against any colleague or applicant for employment on the basis of race, color, national origin, religion, sex, gender identity and/or expression, sexual orientation, age, disability and genetic information, or any other category protected by local law.