



Questionnaire to be sent to firms

Nominee Profile & Eligibility (Administrative / Pass-Fail)

These questions confirm eligibility.

1. Full name of nominee
 2. Age / Date of birth
 3. Current title and department
 4. Professional qualification(s)
 - o Finance
 - o Legal
 - o Accounting
 - o Other (specify)
 5. Years of transaction experience
 6. Date joined current firm
 7. Confirm nominee is **not currently a partner, director, or principal**
 8. Office / region based in
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1. Deal Experience & Transaction Exposure (20 points)

Goal is to quantify exposure and complexity.

Questions:

1. Approximately how many transactions has the nominee worked on in the last **24 months**?
 - o 1–5
 - o 6–10
 - o 11–20
 - o 20+
2. Please list the nominee's **5 most significant transactions** in the past 24 months.

For each deal:

- Deal name / parties
 - Sector
 - Deal value
 - Deal type
 - o M&A | PE | Capital raising | Restructuring | Listing
 - Domestic or cross-border?
 - Closing date
3. Which transactions best demonstrate the nominee's ability to work on **complex or high-value deals**, and why?
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2. Contribution to Deal Execution (25 points)

This is the most important section.

Employers to answer:

What did this person actually do?

Questions:

1. Describe the nominee's specific role in transaction execution.

Prompt:

- What workstreams did they own?
 - What were they personally responsible for?
2. Provide **2–3 examples** where the nominee materially influenced a transaction outcome.

Examples may include:

- Solving a difficult structuring issue
 - Managing diligence complexity
 - Driving negotiations
 - Identifying material risk
 - Creating innovative solutions
3. If the nominee had not been on the transaction, what impact would that likely have had?

This is a very strong question—it reveals indispensability.

3. Technical Excellence (15 points)

This should be discipline-specific.

Questions:

1. What technical strengths distinguish this nominee from peers at a similar level?

Examples:

Finance

- Modelling
- Valuation
- Structuring

Legal

- Drafting
- Negotiation
- Regulatory analysis

Accounting

- Financial diligence
 - Tax structuring
 - Accounting analysis
2. Has the nominee demonstrated expertise beyond what is typically expected for their seniority?
Please provide examples.
 3. How would you rate the nominee relative to peers of similar age and experience?
 - Top 1%
 - Top 5%
 - Top 10%
 - Above average
 - Average
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4. Leadership & Initiative (15 points)

Important because they're future leaders.

Questions:

1. Describe how the nominee demonstrates leadership despite not yet leading full deals.

Prompts:

- Leads meetings?
 - Coordinates teams?
 - Mentors juniors?
 - Manages client interactions?
2. Give examples of when the nominee:
 - Took ownership without being asked
 - Anticipated problems
 - Showed exceptional maturity under pressure
 3. Does the nominee display partner-level potential? Why?
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5. Commercial Judgment (10 points)

This separates technical stars from future advisers.

Questions:

1. How well does the nominee understand the commercial rationale behind transactions?
2. Does the nominee contribute strategically, or primarily execute instructions?

3. Provide an example where the nominee demonstrated strong commercial judgment.

Examples:

- Understood negotiation dynamics
 - Proposed practical solution
 - Balanced risk vs commercial objectives
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6. Reputation & Peer Recognition (10 points)

This tests trust and credibility.

Questions:

1. How is the nominee regarded internally by:
 - Partners
 - Colleagues
 - Junior team members
 2. How is the nominee perceived by clients or counterparties?
 3. Which three attributes best describe the nominee?
Examples:
 - Trusted
 - Commercial
 - Calm under pressure
 - Collaborative
 - Exceptional work ethic
 - Strategic thinker
 4. Has the nominee received any internal or external recognition?
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7. Future Potential (5 points)

This is the "why Top 20?" section.

Questions:

1. Why do you believe this nominee is among the **Top 20 young M&A professionals in the country**?
2. Where do you see this individual in **5–10 years**?
3. What makes this nominee exceptional?

This open-ended answer is often the most revealing.

8. Referee Statement

Require a signed statement from one of the below:

- Partner
- Managing partner
- Head of M&A
- Senior deal leader

Question:

Please provide a short referee statement (max 500 words) explaining why this nominee deserves inclusion in **The Rising 20**.

Important Submission Rule

To avoid firms submitting generic nominations, the following is imposed:

Evidence Requirement

Each nomination must include:

- ✓ CV
 - ✓ Deal sheet (24 months)
 - ✓ Written motivation (max 2,000 words)
 - ✓ Senior referee endorsement
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One Final Question

Ask the nominating employer:

Would you bet your firm's future on this individual becoming one of its future leaders? Why?

That question tends to cut through polished HR language and gets to genuine conviction.

Panel Process

To preserve both **objectivity and judgment** and so aligns with the DealMakers brand.

- **Round 1:** Score independently
- **Round 2:** Discuss top 30 candidates
- **Round 3:** Select final 20 by consensus

