



Expert Guidance to Help Investment Bankers Say Yes (More Often)

We're here to help investment bankers manage complex deals and maintain strong referral relationships, enabling you to focus on high-value opportunities while achieving the best outcomes for all stakeholders.



How We Help

Every investment banker starts their day with a clear focus: identifying the right deals, managing risk, and ensuring their firm hits revenue targets. Yet, the path to success is rarely straightforward. Deals come in all shapes and sizes—some too small to justify the time investment, others too complex or uncertain to guarantee a return.

While saying “no” is often necessary to protect your resources, it can strain relationships with referral partners or close the door to future opportunities. Balancing responsiveness with practicality is a constant challenge.

That's where we at Oaklyn Consulting come in. We are a resource for investment bankers whose clients don't fit within the traditional success fee model. By stepping in where others say “no,” we enable you to maintain strong relationships, focus on the deals that matter most, and maximize the value of your sales funnel.

Hear It From Our Partners

“You continue to be my go-to for business owners thinking about their business options. I appreciate your approach and everyone I have sent you has said good things.”

“I often think of you because of your innovative and client-aligned fee model. When you start with a consultative approach on the front end and are genuinely OK with a “don't sell” recommendation, your objectivity is intact.”

“My network has appreciated your truly objective advice and upfront and clear cost of that advice. You give your time generously and are a competent and trustworthy resource at a time when many business owners are skeptical of advice.”

“It was a very helpful professional experience. You are very knowledgeable and explained your model transparently, even offering that you were probably not a good match. That is rare. Most people try to force fit their model to every opportunity.”

We're here to help, not compete

Not every deal fits neatly into the traditional investment banking model. Some opportunities are too small, too unconventional, or too uncertain to justify the typical engagement. But those deals still matter—to your referral partners, to your clients, and to the reputation you've built.

At Oaklyn Consulting, we step into that gap. As investment bankers working as consultants, we specialize in the kinds of deals that traditional models can't accommodate. By partnering with us, you can turn challenges into opportunities—monetizing leads, strengthening relationships, and optimizing your pipeline without compromising your focus.

With decades of experience, we bring a flexible, creative approach to every engagement:

- **Tailored Expertise:** Adaptable to venture-backed companies, family-owned businesses, and more.
- **Responsive Collaboration:** Strengthen your referral relationships by saying yes more often.
- **Referral Fee Options:** Monetize every lead by referring deals to us without minimum fee restrictions.
- **No Deal Too Small:** We specialize in handling deals below traditional investment banking floors.

By combining expertise, empathy, and a commitment to positive outcomes, Oaklyn Consulting is here to help you achieve success—one thoughtful partnership at a time.

Helping Investment Bankers Exceed Revenue Targets Without Losing Responsiveness

Maintain the strength of your relationships and maximize the value of your leads by partnering with us.

150+
CLIENTS

4000+
STAKEHOLDERS

9.8
NPS SCORE

