



**IMPACTASSETS**  
INVEST WITH MEANING

## **OPERATIONS ASSOCIATE (FULL-TIME)**

**LOCATION:** Bethesda, MD (Metro DC Area)

**REPORTS TO:** Officer – Operations

**START DATE:** Immediately

Are you interested in enabling the forward-leaning philanthropic and impact investing initiatives of our clients by ensuring high standards of service and operational execution? We are looking for an organized and detail-oriented go-getter to support our Operations Team by providing administrative, record keeping and general client service support for the Giving Fund, the impact investing donor advised fund (DAF) offered by ImpactAssets.

ImpactAssets is a 501(c)3 nonprofit investment company that provides an impact investment asset management platform for donor advisors seeking a blend of positive social outcomes, financial return and risk management, and the advisors that serve them. Our clients finance affordable housing, environmental programs, micro-businesses and community services, domestically and internationally. ImpactAssets has offices in Bethesda, MD (Metro DC Area), as well as San Francisco and New York City.

### **Responsibilities**

The primary role of this position is to provide administrative, record keeping and accounting support for the Giving Fund. Specific responsibilities include:

#### *Giving Fund Account management*

- Assist in new account setup process, coordinating efforts in contributions processing and communications
- Perform account maintenance, including updating contact information, password resets and other account updates or servicing

#### *Cash Activity Monitoring and recording*

- Work directly with external parties and ImpactAssets' team to obtain necessary support for contribution and investment cash transactions.
- Assist in processing new contributions, organizing support and preparing check logs daily
- Assist in processing and recording investment related disbursements and receipts

#### *Grant Due Diligence*

- Work directly with external parties and ImpactAssets' team to obtain necessary support for grant disbursements

#### *Office Administration*

- Provide assistance with daily mailing needs, including contribution - related letters, weekly grant letters & payments and quarterly statement mailings.

#### *Other*

- Provide backup support and other responsibilities as assigned in support of the Operations Team

### **Experience**

- BA or BS degree with strong academic performance
- Accounting or Finance major preferred
- Knowledge, passion for using investing as a means by which to engender social or environmental impact

### **Skills and Attributes**

- Highly attuned administrative skills, attention to detail and professional demeanor
- Can-do spirit willing to do what's needed to get the job done
- Strong Excel skills and ability to interface with various technology systems



- Alignment with ImpactAssets' mission and values
- Flexibility and willingness to work in a virtual team environment
- Ability to work independently and prioritize competing demands

Compensation includes salary commensurate with experience and competitive with other financial service non-profit organizations. We offer a benefits package including a medical/dental/vision insurance, 401(k) employer contribution, professional development budget, employee-directed Donor Advised Fund (DAF) and other benefits including cell-phone and public transportation stipends.

Please submit resume and cover letter to [jobs@impactassets.org](mailto:jobs@impactassets.org) with "Operations Associate" in the subject line.