

## Senior Associate, Custom Investments

### ABOUT IMPACTASSETS

ImpactAssets is the leading impact investing partner for individuals, families and philanthropists seeking to effect real change for people and planet. Bold yet pragmatic in our approach, ImpactAssets' creativity and investment expertise ignites a deeply personal impact investing journey for clients - while we manage the complexities.

Founded in 2010, ImpactAssets' mission is to increase flows of capital to impact investing. Together, with our clients, we are catalyzing investment capital into mission driven business models solving the worlds' biggest challenges.

The result? A fast growing, dynamic organization with nearly \$1 billion in assets under management and an activated community of 1,200 clients. This level of growth, vision and commitment equals great opportunities to grow a career at ImpactAssets.

ImpactAssets is seeking a wide range of colleagues that share our urgency and audacity for driving outsized capital to impact investing. You dream big, have a track record for solving problems and know how to 'get stuff done'.

### THE OPPORTUNITY

The Senior Associate, Custom Investments will assist with investment management functions associated with client-recommended private debt and equity investments. The ImpactAssets Custom Investments team is seeking Senior Associate to support our clients' in realizing their unique impact investment strategies. The ideal candidate is an analytical, organized, flexible and energetic self-starter. You are energized by managing impact investing deal flow, engaging with mission-driven entrepreneurs and fund managers and running a process to assess them for investment eligibility. You have a service heart and you provide yourself in your work. You have meticulous attention to detail, you enjoy reading deal documents and thinking through the long term effects of terms and structures. You are excited to be a part of the engine at the heart of ImpactAssets' mission and the team that catalyzes our clients capital toward social and environmental progress. This is a full-time position reporting to the Director, Custom Investments.

### Responsibilities:

#### Investment Management & Administration

- Support the tracking and review of client-directed investment recommendations and submissions
- Coordinate closings in coordination with colleagues on the Operations Team
- Respond swiftly to investment notifications and corporate actions
- Assess private investment performance
- Develop quarterly and annual investment assessments and escalate performance variances.
- Identify and implement new process improvement opportunities

### **Portfolio Data Analysis**

- Maintain custom investments data used in various datasets and databases, including but not limited to our Investment Management System and Salesforce.
- Interpret investment data, analyze results

### **Investment Servicing**

- Ensure investment documentation and information is available to investment servicing team

### **Client Experience**

- Support cross-functional initiatives to improve the experience for highly engaged impact investing clients

### **Knowledge and Skill Requirements:**

- 2-5 years professional experience in impact investing, private equity and debt, investment management, and/or other financial arenas
- Demonstrable knowledge of and passion for using investing to engender social and environmental impact
- Ability to collect, organize and analyze significant amounts of info with attention to detail and accuracy
- Willingness to assist in all areas of a growing business as needed
- Excellent teamwork and problem-solving skills
- Well versed in Excel, Powerpoint, Word; Salesforce experience
- Positive, enthusiastic, proactive attitude
- Bachelor's degree

### **ImpactAssets Perks & Benefits:**

- Generous vacation and personal days policy
- Competitive salary, 401(k) plan
- Attractive benefits package including health and dental coverage
- Opportunity for career development in a fast-paced, progressive organization

ImpactAssets is an Equal Opportunity Employer. We know our organization is at its best when we include, celebrate and embrace difference. We strive to be a diverse workforce that is representative of our mission, and where all can thrive and belong. We are committed to building a team that includes and respects a variety of voices, identities, backgrounds, experiences and perspectives.

ImpactAssets is an unconventional 501(c)(3) on a mission to change investing. We drive a 'for-profit' model and innovate with 'non-profit' flexibility. We are 'investment revolutionaries' who believe that intentional capital makes the biggest impact on people and planet. We are currently 22 strong, spanning across San Francisco, New York City and Bethesda, MD. And we're only just getting started!