

Senior Associate, Operations

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 over \$1.5 billion in assets under management and an activated community of 1,700+ clients. 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

We are looking for detail-oriented Senior Associate to join our Operations Team and play the critical role of ensuring the quality and integrity of the donor advised fund data. The Senior Associate will immediately be responsible for IA's new account opening and incoming contribution processes as well as providing support to our grant and client service functions. The Senior Associate will have an opportunity to play a leadership role in driving process redesign and enhancement. If you are collaborative, process and improvement-oriented, and genuinely want to be part of a passionate and fast-paced team, this position is for you! The Senior Associate will report to the Officer of Operations, Judith Bartkowski.

While this is primarily a remote position through the end of 2022, the Senior Associate will be expected to occasionally work from the Bethesda, MD office for meetings and other operational needs.

Responsibilities:

Donor Advised Fund Administration

- Ensure that contributions and new accounts are reviewed/approved within service level agreement timelines
- Use attention to detail and logic to ensure transactional data quality
- Support grant due diligence, electronic verification, and approval, as needed
- Utilize ticket management system for timely and transparent processing of all responsibilities
- Use judgement to escalate issues and requests appropriately

Process Improvement & Leadership

- Manage associate(s) in supporting DAF administration function
- Proactively propose and document process improvement opportunities and become part of the solution
- Document processes and best practices for use by the broader operations team

Other

- Provide excellent customer service via phone and email, as needed
- Work cross-functionally with teams such as Client Engagement to ensure smooth operations and communication throughout the client life cycle
- Additional responsibilities as our team grows and staffing shifts

Knowledge and Skill Requirements:

- Bachelor's degree with strong academic performance
- Minimum of 4 years professional experience to include at least 3 years in an operations, financial services or investment management/accounting role, and a minimum of 1 year in a customer-facing role
- Minimum of 1 year experience in a supervisory role managing people
- Knowledge and passion for using investing as a means by which to engender social or environmental impact
- Demonstrated focus on continuous improvement and ability to identify and implement process improvements
- Able to develop sense of urgency around processing and response timelines
- Highly attuned administrative skills, attention to detail and professional demeanor
- Ability to work independently and prioritize competing demands
- Resourceful in searching for responses to questions and developing solutions
- Strong Excel skills and ability to interface with various technology systems
- Flexibility and willingness to work in a virtual team environment

ImpactAssets Perks & Benefits:

- Generous vacation and personal days policy
- Competitive salary, 401(k) plan
- Professional development perks including annual professional development allowance
- Attractive benefits package including health and dental coverage

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 30+ strong, spanning across San Francisco, New York City and Bethesda, MD. And we're only just getting started!