

## Business Development Associate

### 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

As a member of the Business Development Team, you are excited about process and making things more efficient, you excel at client interactions and pride yourself at your customer service expertise. The Business Development Associate (BDA) is responsible for supporting the Business Development Team in the deployment of its strategic plan to increase the flow of capital to impact investing. The BDA will work closely with the Managing Director of Business Development to implement efficient sales operations workflows, generate and maintain sales pipelines and other ongoing reports, optimize the use of the Customer Relationship Management (CRM) system, and help the execution of other ad-hoc projects. The BDA will be joining a team of 6 highly skilled sales professionals who work together to achieve ambitious growth targets.

### Responsibilities:

- Support the Managing Director of Business Development in tracking team and company objectives and key results (OKRs).
- Work with Managing Director of Business Development to maintain sales and management reports necessary to drive strategic sales efforts and campaigns for the team.
- Research incoming leads, track prospecting activity, analyze trends, identify client needs, and help organize and coordinate deployment of sales campaigns and strategies.
- Assist Engagement Officers in preparing for client meetings (e.g. PowerPoint presentations and research) and with post-meeting debriefs and follow-up.
- Respond to inbound inquiries about ImpactAssets's Donor Advised Fund (DAF) and investment products
- Field inquiries and work alongside the various client segment team leads to provide an excellent client experience for our prospects, clients, and advisors
- Support the Business Development Team with outbound calls, meeting scheduling, team calendar coordination and timely follow-up with prospects.

- Support the integration and deepening usage of our CRM system throughout regular sales processes
- Demonstrate strong interpersonal skills with the ability to engage effectively with clients, prospects, external financial and philanthropic advisors and internal peers across various departments.
- Become adept and expert with Donor Advised Fund account opening and maintenance procedures
- Work closely with Client Service and Operations colleagues to expedite the resolution of existing customer inquiries to maximize the customer experience

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

You are passionate about using data and market insights to advance an evolving offering and catalyze funding into the impact investing space and possess the following qualifications:

- Associate: Minimum 2-4 years of experience in investment client service, business development or similar role.
- Strong organization, project management, PowerPoint, CRM and data reporting skills
- Excellent interpersonal skills, including the ability to quickly build rapport with clients, prospects and team members.
- Demonstrated experience using telephone, email and other technology to communicate efficiently with clients.
- Basic understanding of investments and financial services is required. Prior experience with ESG, Sustainable Responsible Investing (SRI), impact investing, philanthropy, donor advised funds, custodial relationships, sales operations is a plus.
- Energetic and organized individual. Highly attuned organizational and administrative skills and attention to detail and professional demeanor.
- Proven ability to partner cross-functionally with other departments.
- Ability to work independently and prioritize competing demands.
- Excellent teamwork and problem-solving skills
- Well versed in Excel, PowerPoint, Word, Asana/project management software, with an aptitude for learning new cloud-based software tools. CRM experience required.
- Bachelor's degree or equivalent experience required

Location: SF and Bethesda preferred. Entire company is currently working remotely at least through the end of 2020.

### **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!