

Operations 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 over \$1 billion in assets under management and an activated community of 1,300 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

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 donor advised fund (DAF) offered by ImpactAssets.

Responsibilities:

DAF Contribution Recording and Account management

- Record DAF contributions in administration system
- Coordinate new account setup process and perform account maintenance, including updating contact information, password resets and other account updates or servicing
- Support maintenance of the contribution tracker, following up on pending contributions as appropriate
- Work with clients and ImpactAssets' distribution team to obtain necessary support for contributions

Grants process

- Provide support for weekly grants process primarily to collect & enter grant recommendations received
- Assist in due diligence on proposed grant recipients as needed
- Prepare grant reporting as needed for program partners

Client Service

- Answer inbound client service phone calls, transferring to colleagues as appropriate
- Manage shared client service inbox, ensure proper response times to inbound email requests

Office Administration

- Provide assistance with daily mailing needs

Other

- Other responsibilities as assigned in support of the Operations Team

Knowledge and Skill Requirements:

- 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
- Strong and personable phone presence – excellent verbal skills
- 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

ImpactAssets Perks & Benefits:

- Generous vacation and personal days policy
- Competitive salary, 401(k) plan
- Attractive benefits package including health, dental and vision 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 27 strong, spanning across San Francisco, New York City and Bethesda, MD. And we’re only just getting started!

Please submit resume and cover letter to jobs@impactassets.org with “Operations Associate” in the subject line.