

Operations Associate – Temporary Position

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 an organized and detail-oriented go-getter to support our Operations Team by providing grant processing, administrative and record keeping support for the donor advised fund (DAF) offered by ImpactAssets. This role primarily supports our grant processing function to ensure that weekly grants can be processed in an efficient and timely manner. The Operations Associate will be a critical part of our broader Operations team and will report to the Sr. Associate of Operations.

Please note that this is a temporary, full-time role from October 2021 through January 2022.

Location: Must be able to work Eastern Time Zone hours 8:30 am – 5 pm

Responsibilities:

Grants Process

- Be a critical member of the Operations team by providing support for weekly grants process
- Conduct grantee due diligence to ensure grant eligibility
- Track status of and verify electronic payment details for grantee organizations
- Assist with weekly grant approvals and grant letter email process

Account Setup/Maintenance Process

- Perform new account setup and account maintenance responsibilities, including updating personal information and other account servicing requests
- Record contributions in DAF administration system

Other

- Proactively propose and document process improvement opportunities and become part of the solution
- Utilize ticket management system for timely and transparent processing of all responsibilities
- Use judgement to escalate issues and requests appropriately
- Provide excellent customer service via phone and email, as needed

Knowledge and Skill Requirements:

- Minimum of 2 years of experience in an operations, data entry, finance, or client service role
- Demonstrated focus on continuous improvement and ability to identify and implement process improvements
- Able to develop sense of urgency around processing and response timelines
- Energetic and organized individual. Highly attuned organizational skills, attention to detail, professional demeanor, ability to work independently and prioritize competing demands
- Resourceful in searching for responses to questions and developing solutions
- Knowledge and passion for using investing as a means by which to engender social or environmental impact
- Strong Excel skills and ability to interface with various technology systems
- Flexibility and willingness to work in a virtual team environment

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!