

Investment Strategist | Investor Relations

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 1,500+ 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 Investment Strategist is responsible for leading client engagement for the organization's largest and most strategic clients throughout the arc of the relationship, from closing prospects to quarterbacking the ongoing client touchpoints. Joining at this juncture offers the successful candidate the opportunity to lead the development of strategies and frameworks for managing client portfolios and quarterly engagements. Ongoing, this role will contribute important strategic perspective to the ongoing marketing, product development and investor relations functions of the firm.

The position is part time or full time, reports to the Managing Director of Investments and collaborates regularly with the Chief of Staff and CEO/Chief Investment Officer and the rest of the ImpactAssets Investments team. Our team offers a flexible work environment, operating primarily in a remote environment, but coming together periodically throughout the year for in person meetings and offsites.

The ideal candidate is strategic, analytical, detail oriented and proactive, with a service heart. You have an undeniable passion for impact investing and affecting social and environmental change. You embrace investment best practices and thrive in a fast growing, entrepreneurial environment.

Duties and Responsibilities:

Client Engagement and Investment Strategy

- Work with the CIO and the broader Investments Team to design appropriate impact and investment strategies for our largest Custom Portfolio clients, typically foundations, multi-family offices and corporations.

- Work with Custom Portfolio clients to articulate portfolio goals and objectives, design an impact investing strategy, coordinate the portfolio implementation work, and design/implement bespoke impact and investment reporting.
- Quarterback preparation for each of the bespoke quarterly meetings, ensuring a high level of professionalism and client service excellence.
- Lead client meetings, calling on teammates to bring in a deep level of knowledge when needed on specific investments, impact areas, investment types.
- Oversee the development of any custom reporting requested by the client and work with the reporting team to ensure any non-standard reporting meets our quality standards and client expectations.

Prospective Client Engagement

- Prospective clients tend to come inbound, we pick up the process mid-funnel with a “team approach” to pitching our offerings and services. The Investment Strategist qualifies leads, gathering initial client information to inform pitching strategy and leads the team through the process, cultivating important strategic relationships with the prospective client.
- This role contributes an important part of our success as clients conduct due diligence on us, by moving the client through the rest of the funnel ensuring that meetings are happening on a regular cadence, that follow up items are addressed by team members and that the client’s data room addresses their questions.
- Own the continual redesign and articulate the client engagement process from end to end in an effort to continually refine and improve ourselves.

Investor Relations

- Develop a strategy for keeping investors up to date on ImpactAssets Investment Platform fund managers.
- Work with the ImpactAssets Marketing team to plan any webinars or investor meetings in support of that strategy.
- Engage with partners across the organization to represent the client’s point of view for performance reporting, impact reporting and custom portfolio reports as well as marketing materials and fact sheets for new additions to the Investment Platform.

Strategy & Investment Management responsibilities (as desired/qualified)

- Participate in the ongoing Investment Platform strategy inclusive of new fund additions and new product creation, considering client demand, market opportunities and IA’s unique position in the landscape.

- As able, contribute to authorship of ImpactAssets' Climate Solutions, Racial Equity and/or Gender Equality strategies, informing white papers, product design and investment strategy.
- Investment Due Diligence (as desired): From time to time, conduct due diligence on investment opportunities (private funds or companies, debt and equity) and author the Investment Memo for presentation to ImpactAssets' internal or external Investment Committee, assessing financial risk and reward and impact risk and reward.

Knowledge and Skill Requirements:

- The ideal candidate has 10+ years of directly relevant experience in investor relations or client relationship management for investments in private equity, private debt, investment banking and/or impact investing
- MBA or similar advanced degree in finance, business, accounting, economics, or related field preferred
- Team leadership and/or project management experience strongly desired
- Knowledge of and passion for using investing as a means by which to engender social and environmental impact
- Outstanding, demonstrated analytical, research and due diligence skills
- Expert knowledge of Microsoft Word, Excel and PowerPoint
- Excellent written and verbal communication skills
- Flexibility and willingness to do what it takes in a team environment
- Ability to work independently, multi-task and prioritize competing demands

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