

## Senior Associate, Investments

### 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 \$2 billion in assets under management and an activated community of 1,700 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 **Associate, Investments** will support investment due diligence and investment selection for global and domestic investments across all asset classes. The ideal candidate is analytical, detail oriented, and proactive with an undeniable passion for impact investing. You embrace investment best practices, and you thrive in a fast growing, entrepreneurial environment.

- Employment Type: Full-Time
- Location: Remote but US-Based
- Reports to: Managing Director, Investments

### Duties and Responsibilities:

- Under the guidance of senior investment team members:
  - Analyze investments across impact themes, asset classes, sectors, geographies, and structures to assess suitability for ImpactAssets' platform, internally managed vehicles or direct client investment
  - Manage investment pipelines across a range of proprietary investment vehicles
  - Write investment memoranda to document investment due diligence and convey theses to relevant internal stakeholders
- Review closing documents and assist with disbursements.
- Monitor investment performance through investee reporting and develop quarterly and annual investment assessments.
- Support PowerPoint presentation for Investment Committee and Client meetings.
- Prepare content for on-going impact and financial reporting including portfolio details, social indicators, investment details and impact metrics.
- Support the development of investment and impact strategies for IA's offerings in climate and social justice.
- Support the selection of the ImpactAssets 50 and other projects.
- Support the data integration and release of ImpactAssets' annual Impact Report.

### Knowledge and Skill Requirements:

- Minimum of 5 years of directly relevant experience in private equity, private debt, or investment banking. Impact investment experience preferred.
- Bachelor's degree in finance, business, economics, or related field.
- Experience supporting due diligence for private funds. Portfolio management and investment analysis experience preferred.
- 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. Experience evaluating impact preferred.
- Expert knowledge of Microsoft Word, Excel and PowerPoint, experience using think-cell preferred.
- 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
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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!