

Position Title:	Senior Investment Analyst		Position Duration:	Full -time	
Org Unit:	Capital Activation		Reports to:	Director, Capital Activation	
Employment Status:	W2	Salary:	Grade III Sr Analyst \$85-\$110k	FLSA Status:	Exempt

Position Summary:

[Impact Charitable](#) exists to help close capital gaps that exist among deserving, high-impact ventures, projects and funds. Partnering with Private Foundations, Individuals, and Government offices, the organization leverages its expertise and flexible structures to unlock and accelerate the flow of impact-first capital. The Senior Investment Analyst, in coordination with the Director of Capital Activation, is responsible for managing and executing our internal processes for evaluating and making direct investment decisions through to the execution of specific investment transactions while leading the management of our growing investment portfolio.

Essential Duties:

- Complete financial, business, and market analysis on an exciting variety of impact-oriented entities including for-profit social enterprises, nonprofit organizations, small businesses, Community Development Financial Institutions (CDFIs) and Impact Investment Funds.
- Work with multiple stakeholders to creatively shape and structure investment deals that create maximum social and financial value using a wide range of investment structures (debt, equity, revenue based financing, etc.).
- Prepare credit memos for Investment Committee review that are accurate, insightful, and compelling.
- Perform ad hoc financial analysis including scenario planning and investment analysis that are critical to decision making.
- When needed, assist early-stage ventures with building required pro forma financial projections, cash flow forecasts etc. necessary to support a successful investment.
- Coordinate with Finance/Accounting to ensure proper accounting for all investment transactions as well as ongoing investment management.

- Portfolio Management (post investment):
 - Monitor repayments per the loan/investment covenants
 - Ensure the collection and review of quarterly financial statements and impact reports
 - Build and maintain relationships with portfolio companies and provide post-investment support/intervention as needed.
 - Coordinate with accounting/finance on models for evaluating risks to the portfolio and associated accounting activities (loan loss reserve)
- Collaborate with Finance, Capital Activation, and investment committee in continuous evaluation and improvement of frameworks, policies and processes.

Key Competencies

- Analytical Abilities: Must possess strong analytical skills to assess business models, market trends, and financial data. Ability to identify key drivers of success and evaluate potential risks.
- Financial Acumen: A solid understanding of financial concepts and comfortable with building financial models, analyzing financial statements, and developing investment memos (recommendations).
- Industry Knowledge: Familiarity with the ever evolving impact investing space.
- Communication and Presentation Skills: Strong communication (both written and oral/presentation) skills.
- Teamwork and Collaboration: Ability to work closely/effectively with colleagues, funders/investors and investees. Ability to collaborate, share insights, and contribute to team discussions and cross functional process improvements.
- Ability to collaborate effectively with individuals/organizations that serve or are from different cultural or socio economic backgrounds
- Seek to provide inclusive access and agency to those with whom you collaborate
- Sensitivity to bias and intention to address how that bias influences the mission

Desired values, qualifications & skills

An ideal candidate will value:

- Our purpose to help unlock and accelerate the flow of capital that sparks positive change,
- Ability to take initiative and work semi-independently
- Balancing work quality with efficiency and productivity
- Our organizational values of: being boldly entrepreneurial, collaborative, excellence, trust, continuous learning, relationship centered, celebratory.

And have a background and skills that include:

- 7+ years demonstrated experience in a similar role
- Excellent attention to detail, accuracy, document review, and proofreading skills
- Excellent planning, organizational, and time management skills
- Excellent verbal and written communication skills with the ability to communicate effectively with a high level of professionalism to both internal and external audiences
- Ability to be adaptable and responsive in an evolving startup environment with competing priorities and deadlines
- Strong comfort with, and demonstrated ability to learn, technology tools, such as Google Workspace, Microsoft Suite, Down Home (loan servicing), c_suite (our fund accounting and grants management system), project management systems (Asana), and communication systems (Slack)

Preference for candidates that also have one or more of the following:

- Experience within private equity, private debt or venture capital,
- Exposure to, or deep interest in, impact-first investing; this might include experience working directly with nonprofits, social enterprises, philanthropic endeavors or investment firms
- Lived experience in our target investment communities, such as BIPOC, New American, veteran, and other overlooked and underestimated communities

Compensation

This is a Senior Manager level role with an annual salary range of \$85,000 - \$110,000 per year, plus company incentives, based on your unique skills and experience.

This position includes company standard benefits:

- Generous time off plan along with 13 paid holidays
- Remote and flexible work schedule and environment
- 401k retirement plan with 3% employer match
- Technology stipend
- Access to health/dental/vision plan

Work Environment

- There is no expectation or required travel for this scope of work.
- Remote (Hybrid if local)

To Apply:

Please prepare and send:

Resume



Cover letter outlining experience and interest in this position and
One relevant work sample that demonstrates your alignment with the key competencies

Information can be sent to James McClair, Director of Operations,
james@impactcharitable.org

Applications due May 3, 2024