Associate, Capital Formation & Investor Relations

Boston, MA

About Social Finance

Our Mission

Social Finance is a 501(c)(3) nonprofit dedicated to mobilizing capital to drive social progress. We bring together uncommon partners—governments, investors, and nonprofits—around a common purpose: to measurably improve the lives of those most in need. Our intention is to strengthen the link between performance and payment—driving more funding toward programs that work – via Pay for Success applications.

What is Pay for Success?

Pay for Success (PFS) is a unique innovation in impact investing. It generates returns by creating efficiency in the way government deploys taxpayer funds—by investing in prevention and focusing on outcomes. In any PFS financing, every dollar of return directly represents a tangibly measured unit of human impact. At the same time, it's a methodology for agreeing on the outcomes policymakers and communities choose to prioritize, and a reimagining of the social sector that focuses on results and rewards performance.

Our Services

Social Finance partners with governments, nonprofits, foundations, impact investors, and financial institutions to create innovative financing solutions to improve social outcomes. In the Pay for Success and Social Impact Bond market, our **Advisory Services, Social Investment, and Active Performance Management** teams support all phases of work, tailored to the needs of our partners. We are focused on developing a strong Pay for Success field through market education, publications, events, research and analysis. Most recently, Social Finance launched our **Public Impact Initiative**, which uses the full range of Pay for Success tools – like active performance management and innovative funding mechanisms such as outcomes rate cards – to help governments design, fund and manage effective social services.

Role and Responsibilities

The Associate of Capital Formation and Investor Relations will report directly to the Director of Capital Formation & Investor Relations and play a critical role in supporting the firm's transaction work by connecting impact capital with appropriate opportunities. The Associate will work closely with a variety of internal teams (deal teams, accounting & finance, legal, and communications) to support the firm's capital formation and investor relations efforts, while also performing certain back-office functions. Social Finance has a strong culture of client service and high performance that this candidate must embody. Responsibilities include:

- Support the Director's efforts to develop, maintain and grow the impact investor base for Social Finance and its affiliates. This may include, but is not limited to, family offices, high net-worth individuals, non-profit grant makers, and corporates including banks, and other financial institutions.

- Support dynamic business development strategies and processes to ensure that Social Finance is well-positioned to develop new funder relationships, while deepening important existing relationships. This will include attending occasional impact investing conferences and supporting follow-up needed to develop prospective new client relationships.

- Coordinate investor education and communications activities across projects, such as prospective investor calls, annual investor calls, events, etc.

- Partner with the Director of Capital Formation and Investor Relations and the Director of Communications to develop compelling marketing and communications strategies, especially as it relates to field building in the funder community.

- Manage and coordinate workflow and processes associated with client requests, capital calls, distributions, deliverables and presentations; work with departments throughout the firm to prepare reoccurring deliverables.

- Respond to investor inquiries in a prompt and professional manner, utilizing both oral and written communications.
- Prepare Director for meetings by having all forms, required data, and presentations assembled and organized.
- Assist with ad hoc projects as needed. Candidate will embody a client-centric culture to refine existing products and services to meet client need.
- Over time, work could include supporting the Director's work in advising deal teams on optimal capital structuring. This may include synthesizing feedback from investor conversations and auditing financial models owned by the deal teams to ensure investor requirements are appropriately considered.

Qualifications

We are looking for an entrepreneurial professional who has the flexibility and aptitude to take on the above Roles & Responsibilities, as well as additional duties that management deems appropriate. This role requires strong project management and communication skills, the ability to work in a dynamic group environment, well-developed organizational skills and solid data management capabilities.

Candidate must have:

- 2 - 4 years of experience in a role with substantive investor relations or client services responsibility, including significant client-facing interactions
- Excellent oral and written communications skills; the ability to deliver messages in a compelling way; ability to quickly research, synthesize and summarize key lessons on unfamiliar topics
- Advanced interpersonal skills and the ability to communicate and work closely with stakeholders across multiple sectors
- Experience in financial back-office activities
- Commitment to excellence and accuracy, with an ability to manage multiple and competing priorities simultaneously
- Willingness to constructively express contrary points of view and seek consensus among strong, independent thinkers
- Capacity to work independently while contributing to team projects as appropriate

- Sense of humor and flexibility to regularly incorporate the feedback of others into work processes
- Expertise in PowerPoint and Excel required; substantive financial modeling skills a plus; experience with Salesforce or other CRM systems a plus
- Comfort operating in a deadline driven, constantly changing environment
- The ability to complete requests for financial, client, and other data and analysis with a low error rate
- Demonstrated interest in and knowledge of key issues in effective nonprofit management, social interventions, and/or impact investing (e.g. academic coursework, consulting projects, volunteer work, etc.)
- Bachelor's degree required

Application

Applicants must be currently authorized to work in the United States on a full-time basis. Send cover letter and resume to hiring@socialfinance.org (Subject line: Associate, CF & IR). Review of applications will begin immediately. No phone calls please.

Social Finance, Inc. is an equal opportunity employer, and all qualified applicants will be afforded equal employment opportunities without discrimination because of actual or perceived race, color, national origin, sex, age, religion, creed, disability, marital status, citizenship, ancestry, personal appearance, sexual orientation, gender identity or expression, political affiliation, military status, status as a protected veteran, genetic information or any other legally protected status.