Director, Investor Relations

Boston, MA

About Us

Social Finance is a national impact finance and advisory nonprofit. By working with the public, private, and social sectors, we create partnerships and investments to measurably improve lives. In the past decade, we have mobilized over $225 million to help more than 35,000 individuals realize improved outcomes in education, economic mobility, health, and housing.

We are driven by the belief that social and economic systems should enable all people to thrive, and the conviction that we can create the most meaningful and measurable change in our communities when governments and markets work together. Our organization is built upon four core values:

- Putting people first
- Focusing on results
- Demonstrating the highest standards of integrity and accountability
- Building enduring cross-sector partnerships

And it is strengthened by a commitment to diversity, equity, and inclusion (DEI).

We work across three core practice areas: impact investing, advisory, and field building. Through our impact investing portfolio, we develop and manage innovative investments, including the Career Impact Bond and the Social Impact Bond. In our advisory practice, we work alongside impact-focused leaders to implement outcomes-oriented approaches. And in our field-building work, we share firsthand learnings and best practices to catalyze social impact in the field. Across all our work, which spans the public, private, and social sectors, we continually challenge ourselves and our partners to use funding and data in innovative ways to create lasting impact.

The Opportunity

We are seeking an experienced investment management client service or investor relations professional who is ready to join a mission-oriented organization and own a brand-new function within the Social Finance team.

Reporting to the Managing Director, Impact Investing and partnering closely with other impact investing team members, as well as our VP of Partnerships and Strategy, the Director, Investor Relations will be responsible for building, developing, and maintaining relationships with all existing investors, onboarding new investors, and running an excellent service delivery platform to ensure investor expectations are met and exceeded. Responsibilities will include, but are not limited to, the following:

Investor Relations

- Identify, cultivate, and grow relationships with investors
- Understand a diverse group of investors' overall objectives that influence their investment and support needs, and tailor communications accordingly
- Lead and/or collaborate on projects and strategic initiatives (fund launches, restructurings, building new investor reports, solving for new market opportunities)
- Manage all investor engagement, including, but not limited to meetings, calls, email correspondence and events or conferences (virtual and in-person, when safe); prepare relevant materials in advance of investor interactions [*will have administrative assistance for certain event planning logistics*]
- Proactively participate in investor interactions alongside senior investment colleagues, ensuring consistent messaging, presentation and recording of same
- Liaise with other teams and individuals throughout the firm to ensure accurate forecasting and close partnership on cross-departmental initiatives, including project teams, Finance, Communications and Legal
- At all times, exercise discretion in leveraging data and managing investor relations

Fund Data, Analytics and Reporting

- With Legal team, coordinate investor relations across all transactions, including facilitation of onboarding new investors, investment management agreements, guideline-related issues, and investment compliance matters, where relevant
- Organize and analyze investor and fund portfolio data; prepare and synthesize data to provide recurring (quarterly/monthly) and ad hoc investor reports, as well as other marketing documents such as pitch books, risk reports and customized thought pieces
- Leverage fund analytics and deep knowledge of fund mechanics, performance, and trends to develop and respond to various investor queries
- Partner to enhance the customer relationship management (CRM) system, which may include retrieving and integrating existing data from other systems, reports, and files; own and ensure that CRM is properly leveraged to serve as “one source of truth” and accurate record of investor and fund activity
- Serve as a trusted resource regarding ad hoc investor data requests

Qualifications

- At least 10 years of increasing experience in investor or client relations within an investment management firm; experience may include MBA
- Proven experience interacting with a diverse investor population
- Proven experience developing and iterating on investor marketing materials
- Deep fluency in financial literacy, fund operations, investment principles and associated data; ability to synthesize complex financial data into detailed reporting tools, reports and summaries
- Experience managing a CRM and ensuring clean data inputs, reporting and analytics; experience with instruction and training for staff on CRM best practices a plus
- Ability to operate independently and strategically as a thought leader of a new function and in the details of day-to-day investor relations operations
- Excellent written and spoken communication ability; experience coaching investment managers (portfolio managers) on interacting with prospective and existing investors
- Desire to bring existing skill set to a mission-oriented organization in a highly collaborative manner
- Commitment to enhancing a team culture of inclusion, belonging and equity

Benefits

At Social Finance, we strive to deliver a benefits program that will enhance our overall value proposition to employees. Our current benefit offerings include:

- Comprehensive health care coverage: medical, dental and vision insurance; flexible spending accounts; Employee Healthy Actions programs and more
- Retirement savings plan with employer contribution
- Short-term, long-term and life insurance policies
- Commuter benefits and cell phone reimbursements
- Hybrid work model (in office three days per week, work from home two days per week and on an ad-hoc basis as needed)
- Dedicated budgets for team building and employee recognition
- Annual budget for external professional development opportunities
- Mentorship and onboarding programs
- Collaborative and energizing workspaces in downtown Boston, San Francisco, and Austin
- Paid vacation and paid holidays (with 12/24-1/1 off every year)
- Paid parental leave
- A truly stellar team of high performing, values-driven and fun (!) professionals

Application

Applicants must be permanently authorized to work in the United States on a full-time basis. Please send a cover letter and resume to hiring@socialfinance.org (Subject line: Director, Investor Relations). Further sample work product may be requested during the interview process. Review of applications will begin immediately. No phone calls please.

Please note that, at this time, to be in-person at a Social Finance office, client location or Social Finance-sponsored event, you must be fully vaccinated against COVID-19.

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.*