



Impact Investing Business Development Coordinator Job Description

Employment Type: Full-Time (Pacific Time Zone)

Salary: \$70,000 per year

Location: Remote

Benefits: Full

Application Deadline: October 31, 2021

Organization Summary

Adasina Social Capital is an investment and financial activism firm that believes that community-sourced impact data should set the standards for how publicly traded companies participate in racial, gender, economic, and climate justice. Our diverse team of people from non-traditional backgrounds works closely with the communities we intend to impact – aligning investors with social justice movements. In addition to managing investment portfolios, Adasina mobilizes investors to drive long-term impact through industry campaigns and education.

Job Summary

The Business Development Coordinator (BDC), a junior-level position, acts as a hybrid wholesaler that both sells Adasina's investment products, and administratively supports the person in the director-level sales role. The BDC manages business development relationships, communications, and associated technology platforms. The BDC also supports the Director of Institutional Business Development (DIBD) in the administration of business development processes.

The ideal candidate is eager to learn and excited to engage with prospective investors, able to prioritize and manage a meaningful workload, able to work both independently and as part of a cohesive team, has strong communication/networking skills, and is interested in working in a fast-paced environment.



Details of Role

BUSINESS DEVELOPMENT PROCESS COORDINATION (34%)

- Collaborate with the DIBD to formalize, document, and refine the business development process within customer relationship management (CRM) system
- Maintain and update prospective client and relevant pipeline information within CRM software
- Coordinate and manage business development projects with both internal and external marketing teams and technology partners
- Identify marketing materials used in the business development process that require SEC and FINRA advertising review and coordinate with marketing and compliance teams to obtain approvals
- Work with DIBD to ensure deadlines for both client deliverables and compliance requirements are met
- Develop and provide reports to DIBD and CEO to track prospective clients and respective assets in the pipeline

BUSINESS DEVELOPMENT COMMUNICATIONS MANAGEMENT (33%)

- Assist DIBD in developing compliant business development communications systems and templates, including emails, meeting agenda, FAQs, and proposals
- Field and maintain responsibility for timely and appropriate responses to all incoming Adasina product interest, including from existing and prospective financial advisor partners and institutional allocators
- Track the progress and pipeline of incoming Adasina product interest within CRM software; coordinate introductions to DIBD and other appropriate members of the Adasina team when necessary
- Prepare and coordinate creation of compliant pitches, presentations, and speaking engagements to prospective investor audiences

FINANCIAL ADVISOR RELATIONSHIP MANAGEMENT (33%)

- Maintain active relationships with financial advisors at all stages of investment interest
- Meet quarterly with financial advisors to answer questions regarding product implementation
- Manage lead generation and qualification processes

Requirements

- 2+ years of relevant investment industry experience
- Demonstrated experience with project management
- Demonstrated ability to identify and convert new investment leads
- Series 65 or ability to obtain within six months of employment
- Proficiency with Google Workspace
- Strong organizational skills and time management abilities; capacity to prioritize competing responsibilities
- Strong written and verbal communication skills
- Ability to work with a diverse range of staff and partners
- Willingness to learn new skills and systems and to collaborate in other areas as needed

Preferred Qualifications

- Experience in marketing and/or business development
- Experience with Monday.com or similar project management system
- Experience with HubSpot or comparable CRM
- Strong understanding and/or experience with social justice organizations and causes



- Demonstrated interest in, and experience with, social justice activism and/or impact investing

How to Apply

To apply, please submit your resume and a short cover letter explaining your qualifications and why you are interested in the position to apply@adasina.com. Please have the subject line of the email read "Application for BDC_[Your Last Name], [Your First Name]." Applications will be accepted until October 31, 2021. Initial and final interviews will be conducted during the month of November.

Adasina values creating a diverse workplace that reflects our values and community. Women, BIPOC, and LGBTQ+ candidates are strongly encouraged to apply. Investment management and financial services are a highly regulated industry, therefore all applicants must respect confidentiality, adhere to the firm's Privacy Policies and Code of Ethics. Pursuant to the California Fair Chance Ordinance, Adasina Social Capital will consider for employment qualified applicants with arrest and conviction records.