
JOB DESCRIPTION

Position: Investor Relations Associate

To perform this job successfully, an individual must be able to perform each essential function safely and satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions, unless providing such accommodations will present an undue hardship.

Responsibilities

- In coordination with the CFO, reply to investor and funder due diligence requests and address other ad hoc requests for information from investors.
- Maintain investor compliance database, ensuring any new compliance requirements are added to the database
- Create and maintain investor presentations and marketing materials, in conjunction with the external relations team
- Enters and maintains investments in Portfolio
- Prepares and updates all investor reports, including the investor dashboard, cost of capital report, master investment report, list of funders and investors, and others
- Prepares and updates all quarterly and annual investor compliance reports
- Participate in the collection and organization of financial, portfolio, and social impact data both for investor compliance, investor applications, organizational grant applications,
- Assist with the application process for federal CDFI Funding opportunities (e.g. Financial Assistance, New Market Tax Credits, and Capital Magnet Fund programs) – including document/data gathering, contributing to strategy development, writing and editing narratives, and entering information into AMIS, the CDFI Fund's online system
- Develop relationships with investors, with an emphasis on individual and religious investors
- Assists the CFO with coordinating the investor recruitment process
- Completes other assignments as required

Nature & Scope of Working Relationships

The Investor Relations Associate position requires maintaining a good working relationship with the Executive management team, staff; borrowers; investors; and other stakeholders. The Investor Associate reports directly to the CFO.

Major Challenges/Performance Measures

The Investor Relations Associate primary responsibilities are; 1) maintain all investor correspondence, information and documents, and compliance, 2) support investor capitalization efforts, 3) support all investor reporting.

Qualifications

The Investor Relations Associate will possess the following:

- The ability to organize and handle multiple priorities simultaneously
- Ability to work effectively in a highly collaborative team work environment
- Good organizational skills
- Excellent oral and written communication skills
- Advanced knowledge of Excel, PowerPoint, and MS Word applications
- Interest/commitment to values of community development and CCLF's mission

Minimum educational requirement: Bachelors degree in business, real estate, economics, urban planning or a related field. The investor relations associate position is perfect for a recent college graduate with less than (4) years of experience in general administration, financial analysis, compliance, or reporting and is interested in enhancing these skills within the CDFI industry.

Work Conditions.

Majority of time is spent indoors in an office atmosphere. Occasional local travel may be required. While performing the duties of this job, the employee is regularly required to sit, use hands, talk and hear. This position requires occasional standing, walking, kneeling and crouching. This employee must occasionally lift and/or move up to 25 pounds.

It is the policy of the Chicago Community Loan Fund not to discriminate against any applicant for employment, or any employee because of age, color, sex, disability, national origin, race, religion, marital status, sexual orientation, gender identity or veteran status.