
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. A reasonable accommodation may be made to enable qualified individuals with disabilities to perform the essential functions, unless providing such accommodation will present an undue hardship.

The Investor Relations Associate provides critical and substantive support to CCLF's lending, marketing and portfolio management programs, enjoying a wide range of duties and responsibilities. The position supports the work of the Chief Financial Officer. The position includes direct and indirect contact with and service to our applicants, borrowers and investors.

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 investor marketing materials
- Enter and maintain investments in Portfol and Smartsheet
- Prepare and update all investor reports, including the investor dashboard, cost of capital report, master investment report, list of funders and investors, and others
- Prepare and update all monthly, 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
- Assist the CFO with coordinating the investor recruitment process
- Complete 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
- Experience with Smartsheet and/or Salesforce is a plus
- Ability to organize and handle multiple priorities simultaneously
- Ability to work with a diverse range of community-based groups
- Interest/commitment to values of community development and CCLF's mission

Minimum educational requirement: Bachelor's degree in business, real estate, economics, political science, 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, data analytics or reporting and is interested in enhancing these skills within the CDFI industry.

Pay and Benefits: Nonexempt Hourly Salary Range: \$25.30 - \$31.63; Medical/Dental/Vision/Life Insurance/STD/LTD; 40 hours Paid Leave/96 hours Paid Sick Leave/104 hours Vacation; 8 hours Birthday Pay/10 Holidays/6 Mental Health Days.

To be considered and remain eligible for employment with CCLF, the individual must be an established Illinois resident at or by the time individual commences employment, and remain a permanent Illinois resident throughout the individual's employment with CCLF.

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.

No Phone Calls.



CHICAGO COMMUNITY LOAN FUND

29 East Madison, Suite 1700

Chicago, IL 60602

312.252.0440

www.cclfchicago.org

Please submit resume to Jobs@cclfchicago.org