



Position: Client Engagement Director

Type of Role: Full-time

Location: Remote until further notice. Upon reopening, a preference for our headquarters in Boston, MA; or our other satellite locations in Washington, DC or San Francisco, CA

About CapShift

Do you thrive in a fast-paced, collaborative environment with room for growth? We are a small team in a mission-driven startup working at the intersection of finance and impact to help our clients invest in social enterprises, impact funds, and transformative new ideas. Working at CapShift offers the opportunity for rapid development along with the ability to work with a diverse group of teammates.

All roles at CapShift require flexibility and collaboration, given the small start-up nature of the organization. CapShift is looking for a Client Engagement Director who will:

- **Institutional Account Management** – Manage complex relationships with senior leadership across donor advised fund (DAF) providers, foundations, financial advisors, and family offices, ensuring the highest quality deliverables and delighted clients. Build strong relationships and provide exceptional customer service.
- **Client Engagement** – Provide support for our platform users, primarily philanthropic families and their advisors, to better utilize our tools and services to build impact investment portfolios.
- **Sales** – Serve as the primary point of contact for inbound inquiries from potential clients and projects and funds seeking funding. Work with the Sales and Research teams to do the necessary research to qualify inquiries.
- **Partnership Development** - Build trusted relationships with CapShift's stakeholders to help them address key business challenges. This includes managing relationships with leading impact investing foundations, families, and funds who refer impact opportunities onto our platform.
- **Proposal Development** - Take CapShift's suite of services and clients' needs in coordination with CapShift leadership team to develop proposals for prospective clients.

Qualifications

- 5-7+ years of relevant work experience
- Finance and investment acumen from studies or relevant work experience
- Enjoy building a breadth of relationships across industries
- Experience managing customer relationships and deliverables
- Fit with working in a high growth, flexible startup environment in which employees are expected to take on multiple responsibilities and leadership positions
- Proactive, thoughtful, self-motivated, detail oriented, organized, and able to effectively communicate across multiple business units and stakeholders
- Prior project management experience and an ability to critically review and prioritize projects based on business needs
- Exceptional writing and proofreading skills
- Advanced Excel and PowerPoint skills required



- Experience with Salesforce CRM desired
- MBA or equivalent experience preferred

About CapShift

CapShift's goal is to increase the flow of capital into initiatives solving global and local challenges. We manage a fast-growing impact investing platform that empowers philanthropic and financial institutions, along with their clients, to mobilize capital for social and environmental change. We work with many leading financial institutions in the \$120 billion donor advised fund market, including Fidelity Charitable and National Philanthropic Trust. Our suite of solutions makes it easy to source and implement impact investments that meet the needs of financial advisors, donor advised fund sponsors and their clients, foundations, asset management institutions, and more.

Our leadership has managed billions of dollars of impact investments in disruptive solutions in the health, education, poverty, community finance, clean energy, and sustainable food sectors. Our team combines deep impact investment experience with a nimble startup culture with the goal of mobilizing capital for social and environmental change. We are committed to building a diverse, talented team of young leaders in the impact investment space.

How to Apply

CapShift is an Equal Opportunity Employer and does not discriminate based on race, ethnicity, gender, religion, sexual orientation, age, physical ability, or involvement in the criminal justice system. We invite individuals with diverse life experiences and non-conventional backgrounds to apply.

Please submit your resume and a cover letter, that details your interest in the role and key qualifications or experience, with the subject Client Engagement Director to jobs@capshift.com.

CapShift offers competitive compensation along with an opportunity for employees to receive equity in the business.