

Position: **Impact Investing Fellow**  
Time: Fall 2020  
Location: Remote

Are you passionate about the power of investing to change the world?

CapShift works with many leading financial institutions in the \$120 billion donor advised fund market, including Fidelity Charitable and National Philanthropic Trust.

We are seeking a dynamic, values-driven Fellow to join our Research team on a part-time basis. The Fellow will be involved in sourcing, qualifying, and conducting impact, operational, and financial due diligence on investment opportunities across various impact areas and asset classes. This includes private equity, venture, credit, real estate funds as well as direct investments in social enterprises.

The Fellow will report to the Director of Research as part of the research team and must have a strong financial and investment background and understanding of impact management or sustainable investments. This position provides a unique opportunity to both gain exposure to a growing field as well as help mobilize capital into investments that have measurable positive impacts on society. The position is fully remote and is part-time, with the weekly time commitment determined based on the candidate's availability and compensation based on hours worked.

If interested, please submit an email titled [Impact Investing Fellow] with your CV and a one paragraph statement of interest attached to Scott Babka and Charlotte Cipolletti at [jobs@capshift.com](mailto:jobs@capshift.com). The application period will close on Friday, September 4, 2020.

#### **Qualifications:**

- Current MBA student with studies that include sustainable investing and finance/investments
- Demonstrated passion for impact or sustainable investing through coursework, independent study or work experience
- Understanding of impact management practices and familiarity with the UN Sustainable Development Goals (SDGs)
- Candidates must have a strong attention to detail that will be used in analysis and synthesis of offering documents and pitch books, as well as strong writing skills
- Candidates should understand how financial statements work, have experience analyzing or building financial models and be able to identify the key drivers of any business or fund
- Candidates should have strong communication skills, including a willingness to ask questions to improve one's understanding and the ability to present one's ideas in a concise, effective manner
- Candidates should be interested in working in a high growth, flexible startup environment in which employees are expected to take on multiple responsibilities
- Advanced MS Excel and PowerPoint skills required, experience with Salesforce a plus
- Advanced or Undergraduate degree in Economics, Business, or equivalent preferred

#### **Responsibilities:**

- Support all aspects of the research team, including impact investment sourcing, screening, analysis, evaluation, and presentation
- Engage with fund managers, non-profits, and financial institutions to assess their investment process, impact methodology, and financial returns
- Efficiently analyze investment offering documents to include funds in the CapShift database
- Synthesize and present specific investment opportunities to the CapShift Research Committee
- Proactively identify high quality sustainable or impact investment opportunities through networking and outreach

- Develop relationships with industry experts to both identify investment opportunities and improve the CapShift's impact assessment framework
- Aid the research team in their analysis of specific segments of the impact investment market
- Contribute in other aspects to help CapShift scale. as a member of a high-performance impact venture

**About CapShift:**

CapShift is an early-stage impact investing platform that empowers philanthropic and financial institutions, along with their clients, to mobilize capital for social and environmental change. Partnering with leading industry experts, we provide access to public, private, and nonprofit ventures and funds that operate locally and globally. 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 donors, institutions, and more.

CapShift was founded by MissionPoint Partners, a leading impact investment advisor & asset manager, and Jacques Perold, former President, Fidelity Management & Research Co. Investors in CapShift include the Heron Foundation, Omidyar Network, and other leading community development financial institutions (CDFIs) and pioneering impact investing families.

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. Applicants of all race, backgrounds and identities are encouraged to apply.