



---

## Shareholder Advocate

*Founded as the socially- and environmentally-responsible arm of the 200-year-old asset management firm Loring, Wolcott & Coolidge, the Sustainability Group was created in 1987 by industry pioneer Amy Domini. We manage over one-quarter of the firm's \$7 billion in assets under management, oversee the office's direct impact investment activities, and run a robust shareholder advocacy program that includes both proxy voting and direct corporate engagement. For more information on the firm, please visit: [www.lwcotrust.com/sustainability/overview](http://www.lwcotrust.com/sustainability/overview).*

### **Position Summary:**

We believe that corporations can and should enhance long-term performance by integrating environmental, social, and governance factors into their core business strategy and are looking to add an enthusiastic, talented team member committed to this goal.

The Shareholder Advocate will work directly with the partners of the Sustainability Group and the Director of Shareholder Advocacy to help develop the firm's corporate engagement program and carry out our advocacy work.

The ideal candidate will possess a proven passion for the field of sustainability, demonstrate exceptional research and analytical skills, have careful attention to detail, be self-directed, and manage multiple priorities on a deadline. Integrity, discretion, and respect for confidential information are essential.

### **Responsibilities:**

- Conduct thorough research and analysis on a range of sustainability-related themes.
- Evaluate corporate sustainability performance and identify opportunities for improvement.
- Identify and monitor emerging and long-standing sustainability and environmental, social, and governance (ESG) issues market-wide.
- Synthesize research and analysis and collaborate on the production of reports, client communications, and other content.
- Develop relationships with relevant allies, companies, and other leaders in the advocacy space, such as other responsible investment organizations, as well as with the broader community of environmental, social, and governance researchers and policy experts.
- Assist in responding to client inquiries and creating and maintaining client communications.
- Provide supplemental research to support the firm's proxy voting process.



---

### **Requirements and Qualifications:**

- Bachelor's degree or equivalent relevant work experience.
- Demonstrated passion for working toward a more just, sustainable economy.
- Recommended 2-5 years previous work experience in sustainable investing, advocacy, corporate research, equity analysis, communications, or journalism.
- Experience in assessing sustainability or ESG risks.
- Excellent fundamental research and analytical thinking skills.
- Capable of synthesizing quantitative and qualitative data to create compelling reports and persuasive presentations.
- Excellent verbal and written communication skills.
- Ability to turn individual and collaborative research into clear, succinct recommendations and actionable insights, and comfort presenting in various settings.
- Tenacious follow-up skills and careful attention to detail.
- Strong project management skills, including the ability to self-direct and set individual priorities while also working in a team setting.
- Capacity to provide quantitative analysis of large data sets and databases, produce reports, tables, and graphics for internal and external reports.
- Ability to handle complex, sensitive and confidential material with outstanding judgment, maturity, and an optimistic outlook.
- Flexibility to adapt based on changing needs of the organization and willingness to continually incorporate feedback into an iterative workflow.
- High level of computer competencies: MS Excel, Word, PowerPoint, Outlook and internet research. Familiarity with the SEC's Electronic Data Gathering, Analysis, and Retrieval (EDGAR) system, Bloomberg, FactSet, MSCI, ISS, Glass Lewis, or Sustainability software preferred.

### **Reporting:**

This position reports to the Director of Shareholder Advocacy. This position is exempt and is required to be in the office Monday through Friday. It may necessitate flexibility in hours, from time to time, with little or no advance notice.

### **Compensation and Benefits:**

Competitive salary, commensurate with relevant experience. Loring, Wolcott & Coolidge Office offers a comprehensive benefits package, including individual or family health care and dental coverage, a 401(k) retirement plan with matching employer contributions, generous time off, tuition reimbursement and more.

### **To Apply:**

Please email a resume and cover letter to [careers@lwcotrust.com](mailto:careers@lwcotrust.com).

Note: This job description does not constitute an employment agreement between the employer and employee, and is subject to change by the employer, as the needs of the employer and requirements of the job change.