



LORING, WOLCOTT & COOLIDGE

Trusted Relationships for Generations



## *Impact Investing Associate*

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*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 approximately one quarter of the firm's \$6 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](http://www.lwcotrust.com) and [www.sustainabilitygroup.com](http://www.sustainabilitygroup.com).*

### **Position Summary:**

*Working with the Director of Shareholder Advocacy & Corporate Engagement and the Partners of the Sustainability Group, the Impact Investing Associate will be responsible for voting the proxies of the Sustainability Group clients, and the management of the firm's investments with 100+ Community Development Financial Institutions (CDFIs). This role requires a strong attention to detail, the ability to be self-directed and manage multiple priorities in a time-sensitive environment, and excellent written and verbal communication skills. Integrity, discretion and respect for confidential information are absolutely essential.*

### **Responsibilities:**

#### **Proxies**

- *Independently monitor proxy voting-related workflows and make voting decisions per the firm's proxy voting guidelines.*
- *Evaluate voting recommendations provided by our proxy advisory services. Conduct additional research and contact proponents and subject matter experts, if needed.*
- *Share relevant information on our proxy votes with Trustees of the firm accurately and in a timely manner.*
- *Stay on top of emerging proxy-related issues.*
- *Support proxy-related reporting and client needs.*

#### **CDFIs**

- *Track maturity dates of investments with all CDFIs and process internal forms to direct the renewal or reinvestment of CDs and update in CDFI database.*
- *Communicate regularly with CDFI personnel on matters pertaining to the firm's investments and processing due dates.*
- *Receive and initiate the deposit of interest checks for CDFI investments.*

#### **Research**

- *Support the Sustainability Group in various activities as assigned, including research projects and development of client materials.*



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### **Requirements and Qualifications:**

- *Bachelor's degree or equivalent, relevant work experience.*
- *Recommended 1-3 years previous work experience in an investment, finance, banking or professional services environment.*
- *Passion for corporate governance and sustainable and responsible investing.*
- *Familiarity with proxy voting process and primary asset classes, investment strategies and trust business preferred.*
- *High level of computer competencies: MS Excel, Word, and Outlook*
- *Experience with Sungard's AddVantage or similar asset management software, preferred.*
- *Excellent verbal and written communication skills.*
- *Ability to handle complex, sensitive and confidential material with good judgment, maturity and an optimistic outlook.*
- *Analytical and problem solving skills.*
- *Tenacious follow-up skills and strong attention to detail.*
- *Ability to self-direct and set priorities as well as work in a team setting.*
- *Have both a strong work ethic and a sense of "getting it right."*
- *Be a dynamic Team Player who is confident and enthusiastic.*

### **Reporting:**

*This position reports to a member of the Sustainability Group.*

*This position is non-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.*

*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.*

### **To Apply:**

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