



## **POSITION ANNOUNCEMENT** **INVESTMENT OPERATIONS ANALYST**

**Status:** Full-Time/Exempt

**Reports To:** Managing Director of Impact Investments

**Location:** San Francisco (preferred) or Los Angeles

**Apply By:** June 3, 2022

### **About the Foundation**

Established in 2006 by Wendy and Eric Schmidt, The Schmidt Family Foundation (TSFF) works to restore a balanced relationship between people and the planet. TSFF pursues its mission through three innovative and thoughtful strategies: 1) [The 11th Hour Project](#); 2) the [Impact Investment Program](#); and 3) [Schmidt Marine Technology Partners](#) (SMTP). The Schmidt Family Foundation is a private foundation with growing assets of over \$1B and an impact investment portfolio of approximately \$160M of AUM.

For more information on The Schmidt Family Foundation please visit [www.tsffoundation.org](http://www.tsffoundation.org).

### **Position Description**

The Impact Investing Program is at an exciting point of growth with a recent addition of \$100M to its AUM. The Schmidt Family Foundation seeks a highly results-oriented, collaborative, and flexible early-career investment professional to support the team as Investment Operations Analyst (Analyst). The Program seeks to preserve its capital through making impact-first investments across sustainable agriculture, energy, human rights, and marine conservation. This role requires high attention to detail and the Analyst must take initiative and bring a deep passion for working on the issues of the Foundation. The successful candidate will be self-motivated while also being an adaptable team player as the program continues to build out its investment and operating strategy. This role will report to the Managing Director of Impact Investments as part of a 6-person investing team.

### **Key Responsibilities**

- **Support the Impact Investing team with data input, analyses, report generation, and other investment operations support tasks as requested**
  - Facilitate investment transactions by supporting the relevant Associate/Director leading the deal and coordinating with TSFF's Legal and Accounting teams
  - Manage the independent vendor contracts process in coordination with Legal and HR
  - Manage the execution of grants using the Foundation's grants management system
- **Contribute to ongoing investment portfolio management by working closely with TSFF staff and with investees**
  - Maintain internal systems for portfolio management, inclusive of investment accounting systems
  - Gather and analyze financial and impact metrics from investees on a regular basis
  - Generate investment and financial reports for use by the Impact Investing team
  - Draft PowerPoint presentations for the team for internal and external meetings

- **Assist in investment pipeline development**
  - Conduct market or sector research on a deal-by-deal basis as needed by the Impact Investing team
  - Respond to external investment inquiries and input them into the team's CRM system
  - Communicate effectively and collegially with investees, co-investors, and other TSFF staff and impact investing partners
- **Additional administrative responsibilities**
  - Assist in implementing and optimizing impact investing team project management procedures
  - Maintain internal file organization system
  - Assist with impact investing communication activities, coordinating with the TSFF Communications team as needed
  - As relevant, initiate projects to enhance effective operations

#### **Desired Knowledge and Experience**

- At least 2-3 years of relevant experience in accounting, venture capital, private equity, investment banking, or a related field
- A Bachelor's degree in Finance, Accounting, or a related field, or equivalent experience with a strong grounding in finance and accounting
- Strong attention to detail and commitment to consistently providing high-quality deliverables
- Desire to be part of a highly collaborative team and fast-paced work environment
- Interest and experience (professional or in volunteer capacities) in one or more of the Foundation's main issue areas is a plus: sustainable agriculture, energy, human rights, and marine conservation
- Self-starter with the ability to operate independently and manage multiple projects simultaneously with strict adherence to deadlines while navigating shifting priorities
- Effective verbal and written communication skills

#### **Compensation and Location**

The Schmidt Family Foundation offers a competitive salary that is commensurate with experience and an excellent benefits package that also includes green and wellness benefits. The position is based in San Francisco or Los Angeles, CA. The team currently has a hybrid work model and is splitting time between working at home and in the office. The ideal candidate will be already located in the Bay Area or Los Angeles or willing to relocate. LA-based professionals would be expected to be in the San Francisco home office one week each month.

### **To Apply**

To apply, email a cover letter that expresses both your passion for the mission and fit for the role; resume; and list of three references (candidates will be notified in advance of any outreach to your references) to [tsffoundation@walkeraac.com](mailto:tsffoundation@walkeraac.com) by 5:00 pm PT on Friday, June 3, 2022. Use the subject line: Investment Operations Analyst. Submit Microsoft Word or PDF files only (one combined PDF file is preferred). Resume review begins immediately. *Questions?* Contact our recruiting partner for the position: Jeannine N. Walker, [Walker and Associates Consulting](http://Walker and Associates Consulting), at [jwalker@walkeraac.com](mailto:jwalker@walkeraac.com).

*The Schmidt Family Foundation is committed to using its philanthropic resources to deepen and expand its relationships with organizations led by people of color – both operationally and programmatically. The Foundation is an equal opportunity employer and strives to create an atmosphere where diversity of identity, experience, and background are welcomed, valued, and supported.*

*The Schmidt Family Foundation believes that diversity brings about greater sustainability on all levels and aims to use its resources to generate greater social and environmental diversity through its grant-making and other related investments. Candidates who contribute to this diversity are strongly encouraged to apply.*