



Job Announcement: Senior Manager, Client Engagement

RSF Social Finance is a pioneering nonprofit organization dedicated to using the tools of finance to bring about positive, real-world change. Our goal is not only to make capital available to groundbreaking social enterprises; it's to transform the way people work with money. RSF supports a broad range of nonprofit and for-profit social enterprises in the fields of Food & Agriculture, Education & the Arts, and Climate & the Environment. Primary services include our investing and lending programs, philanthropic programs and services, and Integrated Capital Institute. In partnership with our investors and donors, RSF has made over \$600 million in loans, investments and grants since 1984, placing us in the top tier of social finance organizations worldwide. To learn more, please visit www.rsfsocialfinance.org

Position Summary:

RSF Social Finance seeks to hire a full-time Senior Manager, Client Engagement who will apply her/his professional experience and expertise to advance RSF's vision, mission, and values. The Senior Manager, Client Engagement will support RSF's overall fundraising efforts by selling investment offerings with an emphasis on RSF's [Social Investment Fund](#) (SIF). This person will leverage her/his sales experience to guide all SIF investor cultivation and stewardship strategies and activities including outreach to financial/wealth advisors and high-net-worth (HNW) individuals; and engage RSF staff, Board, and Ambassador connections and networks. This person will also represent RSF at industry events and conferences. The Senior Manager, Client Engagement will inform and direct RSF's SIF notes structure strategy (including the design of a multiple term notes offering) and will work collaboratively with the rest of the Client Engagement team to ensure that annual investment fund goals are met or exceeded.

Responsibilities:

Fundraising, Investor Cultivation & Business Development:

- Achieve individual annual fundraising goals and collaborate with Client Engagement team members to meet overall annual fundraising goals.
- Strengthen RSF's client engagement strategies, sales activities, and outreach efforts in support of RSF's investment offerings, focusing primarily on the Social Investment Fund.
- Cultivate, solicit, and steward relationships with financial/wealth advisors, institutional investors, HNW individuals and other investors in support of Social Investment Fund.
- Design, implement, and direct multiple Social Investment Fund notes plan and offerings.
- Collaborate with Marketing team to develop and refine fundraising collateral and other SIF communications.
- Leverage network of professional contacts/connections to expand RSF's investor prospect lists.
- Conduct field analysis to place RSF in the context of other collaborator/competitor investment fund offerings. Redesign strategy as needed.
- Provide Social Investment Fund transactional support, new account set up, quarterly statement mailings, and access to online client portal, as needed. Re-design investor account business processes to optimize efficiency.

Community Engagement & Team Leadership:



- Serve as a spokesperson and ambassador for RSF at conferences and gatherings. Attend events to expand network, raise awareness about RSF offerings, and build new relationships.
- Work with Client Engagement team members to implement and represent RSF at events for clients, prospects, and other stakeholders.
- Cross-train on fundraising for other RSF offerings and programs, as needed.
- Partner with the Social Enterprise Lending team to learn about and engage with the SIF community of borrowers.
- Participate in Community Pricing Meetings (meetings between RSF staff, borrowers, and SIF investors to inform the Fund's interest rate).
- Collaborate with colleagues to ensure outreach, solicitation, and fundraising goals are met.
- Maintain a strong sense of teamwork, and a positive, efficient working environment.
- Lead special projects, as needed.

Knowledge, Skills and Abilities:

Education and Experience:

- A minimum of 6 years' experience in fundraising, sales, client engagement, or business development.
- BA/BS degree or equivalent preferred.
- Series 7 and 63 license or Series 7 and 63 exam passage within first 16 weeks of hire.
- Significant sales experience including sales of investment products.
- Capacity to execute fundraising campaigns and implement multiple notes plan.
- Demonstrated ability to take initiative, prioritize, and manage workflow, and work independently.
- Outstanding project management skills.
- At least 3 years' experience managing/supervising direct reports.
- Experience working with diverse communities, clients, and stakeholders.

Communication Skills:

- Excellent oral and written communications skills (including the ability to effectively communicate complex ideas and financial offerings).
- Exceptional interpersonal and listening skills to build relationships with staff, clients, prospects, strategic partners, and the public.
- Outstanding presentation skills including the ability to speak and network at industry events and conferences.
- Capacity and commitment to maintain confidentiality and manage highly sensitive relationships and information.

Finance and Analytical Skills:

- Strong knowledge of the key financial instruments and issues in social finance and philanthropic fields.
- Experience working with HNW individual investors, family offices, wealth advisors, and/or foundations.
- Analytical mindset informed by strategy, research, and market trends.
- Technical knowledge of fundraising/business development/sales strategies and tactics.



- Ability to create, manage, and analyze spreadsheets. Ability to review and digest complex written materials.

Technical and Administrative Skills:

- Strong computer skills including, but not limited to: databases, MS Word, Excel, Outlook, and PowerPoint.
- Ability and willingness to do administrative work, including scheduling meetings, recording information in Salesforce, following up with clients, and creating reports.

Judgment and Independence:

- Demonstrable ability to develop effective strategies, with a track record of successful implementation. Passionate drive to establish and achieve well-defined goals.
- Excellent judgment, strong organizational and decision-making skills, and the ability to take initiative and manage time well.

Physical Demands:

- Must be able to travel, including driving and flying, to meet with clients and prospective clients.

Attendance and Availability:

- Must be able to travel extensively, at least 25% of overall time.

Compensation & Benefits:

The expected initial salary for this position is expected to be in the \$100,000 range depending on experience. Other benefits include:

- A fulfilling work environment at a supportive and entrepreneurially-driven organization
- A competitive compensation package including employer-paid medical, dental, and vision insurance benefits
- Extremely generous vacation and sick leave benefits plus eleven paid holidays per year
- 403(b) plan with employer-paid contributions after one year of employment
- Exposure to innovative ideas, projects, and collaborative staff activities
- Access to numerous professional development opportunities

Application Instructions:

Please submit your resume via e-mail to HR@rsfsocialfinance.org along with a thoughtful cover letter. In the cover letter, please explain why you are interested in the mission, values, and activities of RSF Social Finance. Please also tell us why your skills and experience would make you successful in this role. In the e-mail subject line, please write "Senior Manager, Client Engagement".

Please note that applications without a cover letter will not be considered. No phone calls please.

RSF Social Finance is an equal opportunity employer; candidates representing a diversity of backgrounds are encouraged to apply.