

## Impact Research Associate for Investment Advisor

Athena Capital Advisors

Job Title: **Research Associate, Impact Investing**

Location: Flexible, either Lincoln, MA (headquarters) or San Francisco, CA (after initial 3-4 month period primarily in the Lincoln, MA office)

Full/Part Time: FTE

Regular/Temporary: Regular

### Description:

Athena Capital is seeking an Impact Investing focused investment professional to join its research team. Athena has been an active impact investor for many years and is looking to expand our team. Reporting to the co-heads of Research, the ideal candidate is an individual who has a strong interest in the impact/ESG investing field, has three to five years of professional experience in an investment role, not necessarily impact/ESG related, but one that has provided a solid foundation of financial markets and/or due diligence across asset classes or within a particular market segment.

### Our Company:

Athena provides investment management, research and related services to high net worth individuals and non-profit institutions with approximately \$5.5 billion under management. Importantly, Athena has a strong culture and seeks individuals who represent our core values of Excellence, Passion, Integrity and Caring (EPIC). For additional information on Athena, please visit [www.athenacapital.com](http://www.athenacapital.com).

### Job Duties and Responsibilities:

Depending on experience level, the candidate will have leading or supporting roles in the due diligence and monitoring efforts of impact/ESG related investments. The universe of investments will span asset classes from public equities and fixed income to alternatives but depending on background, the associate may focus more on certain market segments. Projects will include in-depth analysis of specific impact issue areas in order to explore the investment landscape and understand how impact capital can create positive change. Additional ongoing responsibilities will include creating quarterly updates of investments and the active management of a database of investment opportunities within the impact/ESG space. The individual will also play a role in continuing to build out Athena's impact platform in terms of internal processes and procedures.

### **Major responsibilities include:**

- Create investment write-ups and quarterly summaries on assigned funds
- Support or lead due diligence efforts of various investment opportunities
- Manage database and pipeline of impact investment opportunities and maintain best practices to keep current
- Contribute to in-depth assessments of topical impact issue areas to understand investment landscape
- Coordinate calls, visits, reviews, and database archives for assigned funds
- Present findings and recommendations on existing holdings and new opportunities to the CIO and Investment Committee

- Flexibility to assist with internal projects and duties across Athena’s research platform and business development efforts as needed
- Participate in daily market update meeting and news analysis

**Requirements:**

- An advanced degree (MBA or other investment related program) and/or CFA
- Investment management experience especially in due diligence and research roles
- Base of knowledge of and strong interest in the impact/ESG investment landscape and financial markets in general
- Strong communication skills, both written and verbal
- Highly organized and proactive
- Strong analytical skills
- Computer skills, including Excel, MS-Access, Factset, Bloomberg
- Willingness to travel as needed
- Willingness to assist in all areas of a growing business as needed
- Candidates must be eligible to work in the U.S.

Interested candidates should send resume, cover letter and salary requirements to [Resumes@athenacapital.com](mailto:Resumes@athenacapital.com) with the title “Impact Associate”. No phone calls please. References and writing samples will eventually be requested from finalists in the interview process.

*Athena Capital Advisors LLC is an equal opportunity employer and affords equal opportunity to all applicants for all positions without regard to race, color, religion, gender, national origin, age, disability, veteran status, sexual orientation or any other status protected under local, state or federal laws. Successful candidates must be able to work in the U.S. for other than practical training. Nothing in this job posting should be construed as an offer or guarantee of employment.*