



## **Associate, Financial Inclusion and Resilience**

New York, New York

### **To Apply**

Please submit a resume to [hiring.fir@ownershipworks.org](mailto:hiring.fir@ownershipworks.org) with the subject line "Last Name, First Name – Associate, FIR." Candidates are encouraged to apply as soon as possible. Due to volume, only those candidates considered for an interview will be contacted.

### **About Ownership Works**

Ownership Works is a fast-growing organization with a mission to increase prosperity through shared ownership at work. We partner with companies and investors to implement innovative shared ownership programs that make every employee an owner and honor the collective effort behind a company's success.

Ownership Works was founded in 2021 to scale shared ownership as a pathway to maximizing shared wealth creation, addressing economic insecurity, and strengthening companies. Our partners manage over a trillion dollars in assets and employ over a million people.

**Ownership Works is building a team of outstanding leaders and professionals** to guide investors and companies through the process of sharing ownership and to evaluate the impact of these programs.

### **About the Financial Inclusion and Resilience Program**

Ownership Works (O.W.) is seeking a driven and mission-oriented professional who is passionate about creating more valuable companies and advancing social impact through engagements with private and public companies as they implement shared ownership programs.

The Financial Inclusion and Resilience (FIR) vertical seeks to maximize the effects of employee ownership by connecting new employee-owners with financial education, tools, and resources to enhance their financial wellbeing. The FIR team will work closely with the Business Engagement team to support companies in implementing the shared ownership program. The FIR team is responsible for building the knowledge base and ecosystems of partners in the financial inclusion space, sharing this information internally and externally, and supporting the design and implementation of new pilots and experiments with partner companies who are supporting their workers' financial wellbeing.

The FIR team is also deeply connected to the other departments at O.W. The team will work with the marketing and communications team to build out thought leadership and marketing materials in the financial wellbeing space, and with the development team to identify and craft funding proposals focused on financial inclusion that expand O.W.'s impact in this space.

## **About the Position**

### Core Goal

The Financial Inclusion and Resilience Associate will help design and operationalize our Financial Inclusion & Resilience vertical, supporting client education and decision-making at every stage of implementation of programs to help working families build economic security and wealth.

### Responsibilities

- **Program design and implementation:** The Associate will support the design of the FIR program and support the Business Engagement team as they help our clients implement the FIR pillar. Activities related to this workstream include, but are not limited to:
  - Supporting the design of a practical and consequential practice that helps companies explore, assess, design, and implement a FIR program for their employees
  - Interfacing with a wide array of potential financial services providers, quickly evaluating options, testing them with experts, and executing partnership agreements
  - Engaging all relevant stakeholders – from employees and HR professionals to financial services experts – to routinely seek feedback and integrate it into our process
  - Joining client meetings as needed to support them in the choice and onboarding of a financial wellness partner
  - Managing a large network of partner-providers, experts, and other interest groups to continually drive successful, innovative client implementations
  - Designing workshops and workshop materials for clients, creating reports and pitch decks, and synthesizing conversations
  
- **Thought leadership:** The Associate will support the team in deepening our subject matter expertise and building the field of financial wellness in the context of employee ownership. Activities related to this workstream include, but are not limited to:
  - Maintaining a comprehensive vantage on the workplace financial wellness field, keeping O.W. and its partners on the cutting edge of innovation in this space
  - Managing knowledge-capture process, including a catalogue of best practices and learnings, to build out O.W.'s internal knowledge-base and documentation in this area
  - Supporting the marketing and communications team to build out thought

leadership and marketing materials in the financial wellbeing space

- **Administration and miscellaneous:**
  - Supporting data management and entering FIR program data into Salesforce platform
  - Working with the development team to identify funding opportunities and craft funding proposals focused on financial inclusion that expand O.W.'s impact in this space
  - Other duties as assigned (for example, supporting events management as they relate to FIR-related activities)

### **What This position at Ownership Works Offers:**

- A unique opportunity to work with top leaders in finance and business to impact the lives of thousands of hard-working individuals by transforming businesses and creating shared wealth
- Opportunity to build subject matter expertise and work with a team focused on a comprehensive approach to shared ownership programs while developing expertise in financial resilience and inclusion
- Talented and passionate colleagues; support and mentoring from highly-accomplished professionals
- A flexible work environment in a people-centered organization

### **Skills & Qualifications**

- A commitment to and passion for Ownership Works' mission
- A bachelor's degree and 2-5 years of experience in financial inclusion, financial wellness, social impact, consulting, financial services, impact investing, program management, or public policy, either in the private sector or non-profit sector. Client (or stakeholder)-facing experience is highly desirable.
- High tolerance for ambiguity: The most important part of this role will be to understand that this is novel work because we are building the field of financial wellness in the context of employee ownership, and we are building a practice supported by the trust of our clients and partners. We will take opportunities to be bold when we have openings, but we also understand that this work takes time.
- Empathy and non-judgment: While being an expert in financial wellness is not a requirement for this role, a key quality for the successful candidate is to understand that people face significant barriers in attaining high levels of financial wellbeing. Our role is to design and surface non-judgmental, practical solutions to help employee-owners build their financial resilience and lead with compassion, respect, and understanding.
- Ability to efficiently create slides in PowerPoint and succinct memos
- Background in managing data, including data related to personal information, or CRM experience would be desirable, but not required
- Ability to independently drive a workstream as part of a broader team project
- Exceptional writing and verbal communication skills

- Excellent relationship management skills
- Highly responsive and collaborative team player
- Proven time management and multi-tasking abilities while maintaining excellent attention to detail

### **Equal Opportunity Employer**

Ownership Works is an Equal Opportunity Employer. All qualified applicants are encouraged to apply and will receive consideration for employment without regard to age, race, color, sexual orientation, gender identity or expression, disability, religion, or sexual orientation.

### **Base Salary Compensation Range**

The compensation available for the role considers a variety of factors including, but not limited to, work location, individual skill set, previous/applicable experience, and other business needs. The estimated salary range for individuals who work in New York City is \$90,000-120,000 per annum plus bonus.

### **Benefits**

Benefits include excellent health, vision, and dental care benefits for you and your family. Unlimited paid time off. 401(k) retirement plan with generous employer contributions.

### **Location**

Ownership Works is building a New York City-based team. We have an office-centric hybrid work model that prioritizes the health and safety of our staff and partners.