



Senior Associate, Client Advisory Services

New York, NY

To Apply

Please visit the [Application Portal here](#). 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

Founded in 2021, Ownership Works (O.W.) is a fast-growing nonprofit organization with a mission to increase prosperity through shared ownership at work. O.W. helps companies and investors implement shared ownership programs that make every employee an owner and honor the collective effort behind a company's success. At scale, employee ownership can help millions of lower-income workers and people of color build savings and wealth, often for the first time, at businesses that are more dynamic, resilient, and successful.

O.W. has set an ambitious goal of creating at least \$20B of wealth for workers by 2030 and, over the long term, making broad-based employee ownership the new norm at work. To achieve these goals, O.W. has two areas of focus:

Movement Building. Through partnerships, network-building, education, data, and storytelling, O.W. is building a movement to increase the adoption of shared ownership by private and public companies. Over 90 private equity firms, financial institutions, foundations, labor advocates, and pension funds have joined the O.W. consortium as Founding Partners and made unprecedented commitments to advance the shared ownership movement.

Hands-on Guidance. In collaboration with its Founding Partners, O.W. helps public and private companies implement broad-based employee ownership programs that improve corporate cultures, increase employee engagement and satisfaction, and create an alignment of interests between employees and employers, all of which can support better outcomes for companies and workers. Since O.W.'s founding, over 113 companies have implemented shared ownership programs, reaching over 163,000 workers.

In 2024, Ownership Works was certified as a [Great Place to Work](#).

For more about O.W.'s programs and impact, visit <https://ownershipworks.org>.

About The Position

This position is ideal for professionals passionate about the intersection of capital markets and social impact. As a member of the Client Advisory Services team, the Senior Associate will play a crucial role in expanding Ownership Works' programs to businesses in both public and private markets, will be responsible for the strategic design and development of financial models for novel ownership plans, and support managing the relationship with our private equity partners. The Client Advisory Services team engages with mission-driven investors and corporate executives to drive effective ownership programs that create value for all stakeholders and build wealth for frontline employees. The role will be crucial to catalyzing employee ownership in new segments of the economy and developing financial models of employee ownership programs and related value-creation plans.

Core Goal

Develop Ownership Works' financial and technical offerings while driving client uptake of ownership programs. Help establish Ownership Works as a thoughtful, value-add advisor to private equity partners and companies implementing shared ownership programs.

What this position offers you

- 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 further develop modeling and consulting skills while building expertise in elements of shared ownership programs.
- Client-facing experience and opportunity to work directly with private equity teams and executives in mid- and large-cap companies.
- Talented and passionate colleagues; support and mentoring from highly accomplished professionals.
- A flexible work environment in a people-centered organization.

Key Responsibilities

- Design and build financial models for shared ownership programs.
- Gather and analyze data and information; formulate customized solutions; develop and present results/recommendations to clients (in Excel or PowerPoint format).
- Prioritize multiple projects, organize workflows, and ensure timely and accurate completion of deliverables.
- Work with Managers and Senior Managers to support and strengthen relationships with private equity partners.
- Contribute to organizational development to achieve ambitious mission and growth targets.

Minimum Qualifications

- B.A./B.S. required.

- 2–4 years of finance or other related experience; investment banking, private equity, or consulting on modeling-heavy workstream experience strongly preferred.

Preferred Qualifications

- Ability to design and build professional financial models in Excel.
- Ability to understand and articulate quantitative drivers in value creation plans (e.g., what is a given model most sensitive to).
- Ability to efficiently create slides in PowerPoint.
- 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.
- Self-starter with an entrepreneurial mindset.
- Proven time management and multi-tasking abilities while maintaining excellent attention to detail.
- Passion for social justice and the mission of Ownership Works; interest in becoming a subject matter expert in employee ownership.

At Ownership Works, we are dedicated to building a diverse and inclusive workplace. If you're excited about this position but your experience doesn't precisely align with every qualification, we still encourage you to apply.

Equal Opportunity Employer

Ownership Works is an Equal Opportunity Employer. Women, people of color, people with disabilities, LGBTQIA persons, and veterans are encouraged to apply.

Compensation

Compensation for this role is determined by several factors, including work location, individual skills, relevant experience, and business needs. For candidates based in New York City, the estimated salary is \$120,000 plus an annual discretionary performance-based bonus subject to board approval.

Benefits

We offer a comprehensive benefits package aligned with the professional services sector, which includes excellent health, vision, and dental coverage for you and your family, unlimited paid time off, a 401(k) plan with generous employer contributions, and 18 weeks of fully paid parental leave.

Location

O.W. is building a New York City-based team. The team works from our brand-new Midtown Manhattan office space two days per week.