



## Senior Associate, Financial Inclusion and Resilience

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 \$20 billion 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 123 companies have implemented shared ownership programs, reaching over 180,000 workers.

Ownership Works is certified as a [Great Place to Work](#).

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

## About the Team

Ownership Works seeks to grow the Financial Inclusion and Resilience team by adding a teammate who is passionate about creating more valuable companies and advancing social impact through engagements with private and public organizations as they implement shared ownership programs.

The Financial Inclusion and Resilience (FIR) vertical is focused on maximizing 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 Client Advisory Services team to support companies implementing the shared ownership program. The FIR team is responsible for building O.W.'s knowledge base on financial wellbeing, curating an ecosystem of partners, sharing this information internally and externally, and supporting the design and implementation of new programs with partner companies supporting their workers' financial wellbeing.

## About the Position

### *Core Goal*

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

### *What This Role Offers*

- Work with top leaders in finance and business to drive financial resilience.
- Develop expertise in financial wellness within employee ownership.
- Collaborate with passionate professionals and receive mentorship.
- Enjoy a flexible, people-centered work environment.

## Key Responsibilities

### *Program Design*

- Help design the FIR practice.
- Evaluate and onboard financial service providers.
- Manage a network of partners and experts.
- Develop case studies, workshops, reports, and pitch materials.

### *Implementation and Client Service*

- Support clients in selecting and onboarding financial wellness partners.
- Work with the Client Advisory Services team to integrate FIR into the ownership journey.
- Engage stakeholders (employees, HR, experts) for feedback on programs.
- Design and implement metrics to measure success of FIR programs.

### *Thought Leadership*

- Maintain up-to-date knowledge of workplace financial wellness trends.
- Document best practices and build internal knowledge.
- Support marketing efforts in financial wellbeing.

### *Administration & Miscellaneous*

- Maintain and own accessible, accurate, and thorough records of our programs.
- Assist in identifying and securing funding opportunities.
- Support event management and other tasks as needed.

### **Minimum Qualifications**

- B.A./B.S. required.
- 2-5 years of experience in financial inclusion, financial wellness, social impact, consulting, financial services, impact investing, program management, or public policy in private or nonprofit sectors. Client-facing experience is highly desirable.

### **Preferred Qualifications**

- Passion for social justice and the mission of Ownership Works; interest in becoming a subject matter expert in employee ownership.
- 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.
- High tolerance for ambiguity.

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.