

# Investment Associate

Anticipated start date: September / October 2023

Salary: \$55,000 - \$60,000

Job Type: Full-time, 1-year contract with possibility of extension

Location: Greater Toronto Area/Remote

Please apply by September 1st to be considered in the first round of interviews. Applications submitted after that date will be reviewed on a rolling basis.

## About Tapestry Community Capital

Tapestry Community Capital is a social purpose organization which supports co-ops, nonprofits, and charities in structuring, raising, and managing community investment. The investment funds are used to finance the purchase, development or major renovation of a capital asset that will benefit the organization and the community it serves.

Since 1998, the Tapestry team has supported some of Canada's most prominent social enterprises in successful community financing campaigns.

We have worked with organizations across multiple sectors, from renewable energy to social purpose real estate, in raising and managing \$100+ million in community investment from thousands of Canadians. We consult with organizations by structuring their investment, supporting their team to raise funds, and providing back-office support to manage assets reliably and professionally.

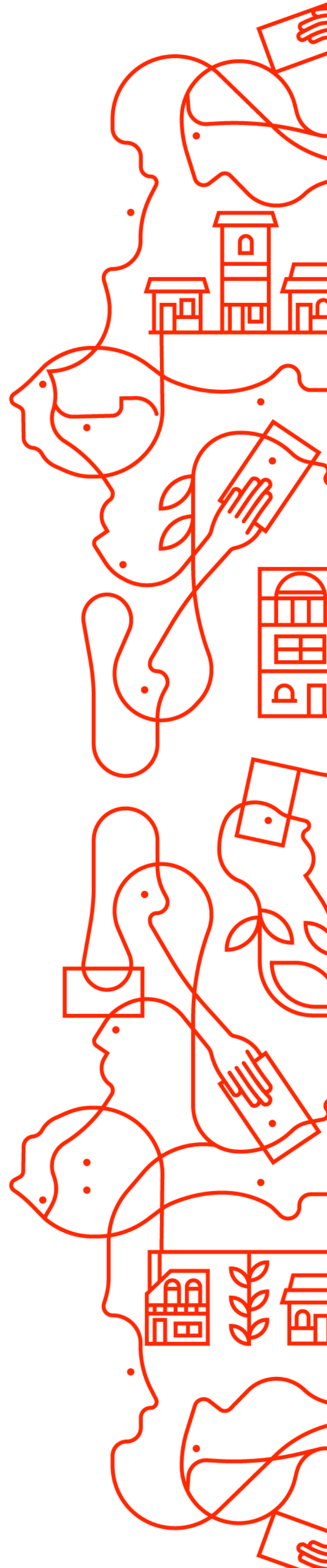
## Job Description

Tapestry is looking for a diligent and results-driven associate to assist the Impact Investment Manager with transaction management, client management and reporting.

This role will suit individuals who are organized and are quick learners, as we are a small team that manages multiple streams. We are also looking for a client-focused individual with experience in business communications. Finally, it is important that you can appreciate the regulated nature of what we do, follow protocols, and asks questions to gain clarity! If this sounds like you, then we want to hear from you!

The Investment Associate reports to the Impact Investment Manager. However, we are cross-functional and highly collaborative by design, and the role will have many touchpoints with the entire team and our clients.

**Tapestry**  
COMMUNITY CAPITAL



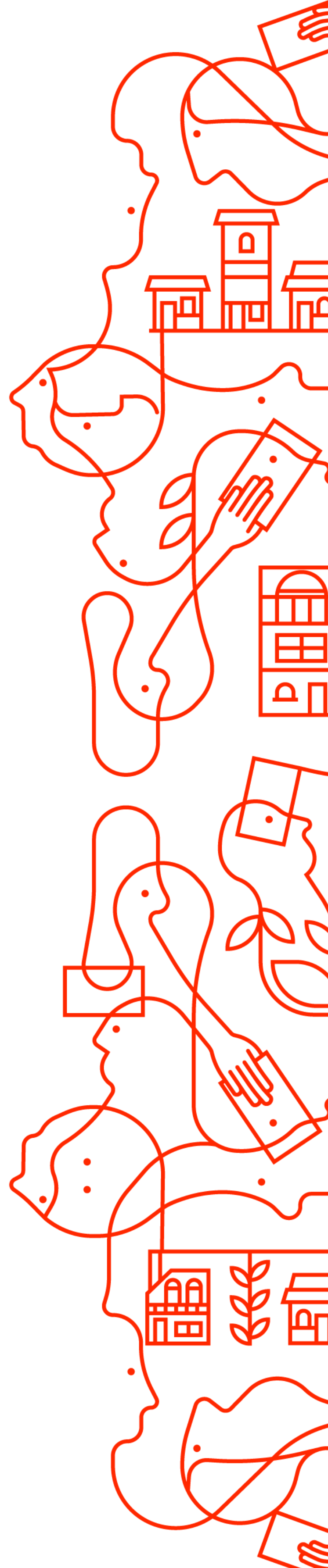
# Investment Associate

## What you will be doing

- Create and update reporting for clients, as well as stakeholders within Tapestry.
- Process membership forms and investment applications
- Generate and arrange for delivery of investment paperwork and approvals to investors and intermediaries, as required
- Meet or exceed customer service standards in managing emails, telephone calls and communications from clients and investors
- Process tax forms for our clients and members
- Assist with yield distributions for members/investors of our clients on a pre-determined schedule using Tapestry's infrastructure
- Track memberships and investments for our clients using prescribed reporting templates and create new tools as required
- Export and manipulate reports for our clients upon their request with an appropriate turnaround time
- Manage investments in projects by:
  - Tracking interest earned on current investments
  - Coordinating further investment or repayment of interest/principle as directed
  - Following up to ensure funds are dispersed as directed and keep in-house documentation and tracking up to date and secure

## Requirements

- 1-3 years experience in an operations / transaction management role
- Degree in accounting and finance, business administration, or applicable experience
- Excellent organizational, time management and prioritization skills
- Ability to follow established protocols, but demonstrate flexibility to adapt to interruptions
- Experience in one-on-one customer service over the phone and via e-mail
- Experience creating reports in Excel for distribution to customers/stakeholders
- Experience working with proprietary software
- Diligence and strong attention to detail
- Experience working in a highly regulated environment
- Data management, numeracy, and math skills
- Financial literacy: investments, financial statements, terminology



## Skills that would be beneficial to have

- CPA designation, or working towards it
- Knowledge of social enterprise and social finance
- Experience with payments systems and transaction management
- Experience with coordinating couriers, picking up and processing inbound and outbound mail
- Experience with scanning documents and digital filing by client and topic, ensuring proper naming protocol is being followed
- Bilingual (English with some level of written/oral French proficiency)

## What we can offer you

- Flexible, remote working environment - we are results-oriented and instill immense trust in our team
- 3 Weeks paid vacation plus a week of rest before each New Year
- Your paid birthday as a holiday
- 8 paid health days
- A Comprehensive Health & Benefits Program and RRSP-matching plan
- Reimbursement of 50% of home internet expenses
- Reimbursement of up to 80% of cell phone
- New laptop of your choice or bring your own device reimbursement
- Opportunity to participate in and shape the growth of a unique, impactful community-oriented social purpose organization
- Opportunity and support for career growth, professional development, and continuous learning

## How to Apply

- Please submit a cover letter with your resume in a single PDF using the job title followed by your first and last name as the filename (i.e. InvestmentAssociateMarySingh) to <https://secure.collage.co/jobs/trec-tapestry/39498>.
- In your cover letter, please address why you are interested in working for Tapestry and how you would be successful in the role, and let us know how you heard about the position.

We sincerely thank you for your interest in working with us. We are a small (but mighty!) team. Thus, only those chosen for an interview will be contacted. Tapestry Community Capital is fully committed to being an equal opportunity employer and evaluating all applications without discrimination or bias. We are also committed to acting on the values of Justice, Equity, Diversity, and Inclusion. We value and welcome applications from diverse experiences. We encourage you to apply even if you do not meet all the above-mentioned requirements

Should you require special accommodations due to a different set of abilities, please do not hesitate to contact us at [careers@tapestrycapital.ca](mailto:careers@tapestrycapital.ca) or at 416-977-5093 ext. 2480.

