



Associate Portfolio Manager, Social Finance— Private Sector

SALARY RANGE (2018): \$60,000–\$70,000 with potential \$20,000–30,000 bonus

I specialize in Responsible Investing (RI) and have done so for the past four years. As an associate portfolio manager, I am responsible for providing overall investment support to the portfolio manager. Because it is a relatively new investment field in which we marry social and financial good responsibly, I have presented seminars for various organizations on the concepts of RI and have also helped a number of nonprofit groups to structure their investment policy to align with their values. My role combines my social work background, experience in micro-lending and business training to help clients align their needs and investment strategies by screening investments with socially responsible investment criteria. By operating within each client's risk profile and keeping their investment objectives in mind, I help to structure a portfolio that will achieve stable growth without taking unnecessary risks. I want to make sure my clients can sleep at night.

The Tip: Some people will think you are too soft, so be sure to document your successes and use tangible facts to grow supporters.

PRIORITY KNOWLEDGE AND SKILLS:

Systems Thinking

Knowledge & ability to:

- Identify and make plans for future trends
- Thrive in ambiguity and manage complexity
- Recognize trends, opportunities and underlying patterns

Human-Centered Design & Design Thinking

Knowledge & ability to:

- Think laterally
- Identify patterns
- Work with third-party groups, such as think tanks, labs and accelerators
- Ability to formulate research questions
- Conduct secondary, qualitative and/or quantitative research
- Synthesize key issues

Communication, Collaboration & Facilitation

Knowledge & ability to:

- Use contextual knowledge
- Communicate effectively in all formats
- Design and facilitate collective impact initiatives
- Facilitate small & large groups
- Cultivate new collaborations and partnerships across sectors
- Develop & execute workshops, training sessions and/or events
- Use technology and specialized collaboration tools
- Compelling presentation & report writing skills

Changemaking

Knowledge & ability to:

- Be authentic, empathetic and ethical
- Ask questions

Oversight & Knowledge Management

Knowledge & ability to:

- Develop and manage the planning process
- Direct coordination of activities across departments, stakeholders, clients & users
- Leverage stakeholder relationships
- Develop and implement program schedules
- Budget management & oversight
- Evaluate social, financial and collective impact
- Manage and analyze complex data

Core Transferable Skills

Be an expert at all core transferable skills:

- Thinking skills
- Communications skills
- Organizational skills
- Interpersonal skills

<ul style="list-style-type: none"> • Embrace challenges as opportunities to create systemic change • Demonstrate long-term social impact and sustainability • Break down silos and leverage relationships 	<ul style="list-style-type: none"> • Technical literacy
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BUILDING BLOCK EXPERIENCES:

<p>Education & Learning:</p> <ul style="list-style-type: none"> • Bachelor of Social Work (leadership stream) • Master of Business Administration • Have spent time building my skillset outside of school, and currently have the following designations: CFA (Chartered Financial Analyst) and RIS (Responsible Investment Specialist). Because I did my MBA at night, most of my CFA and RIS coursework counted towards my master's. 	<p>My observation is things change very quickly and continuous learning seems to be the only way to go. Next on my list is learning how AI and blockchain will affect RI.</p>
<p>Employment Experiences:</p> <ul style="list-style-type: none"> • Worked as an assistant soliciting endowment funds for a college, and on the side picked up contract work writing grants for various social service organizations • While doing my MBA at night I was offered a position at a micro-loan lending agency as a loan administrator for immigrants where I completed intake forms and clarified personal and financial information • After finishing my MBA, I tried working as a customer service agent at a bank to understand traditional lending, but I disliked the sales aspect • The banking environment was not for me, so I started looking around and once my current position was posted and I interviewed for it, I knew immediately it was where I belonged! 	<p>Although I have always been drawn to helping people and was very good at it, I also became interested in understanding how organizations work. Because I could take courses at the local college at a reduced rate, I started to take a few business courses and was shocked to discover I really enjoyed them. That is why I decided to do an MBA.</p>
<p>Community Experiences:</p> <ul style="list-style-type: none"> • Volunteered for nonprofit agency that facilitated micro lending to women in developing countries, learning the other side of the business of social loans • Member, Responsible Investment Association • Part-time lecturer at local college covering social finance and impact investing 	<p>Although I have spent a lot of time taking courses to become accredited and it has been a lot of work – I can now see the light at the end of the tunnel. My plan has always been to pick one specific charity and possibly help on a committee or a board.</p>
<p>Contextual Experiences:</p> <ul style="list-style-type: none"> • Attended a camp for low-income kids then 	<p>Grew up being supported by a single parent who always saw the good in people. My mom was a social worker.</p>

became a camp counsellor as my first job	
Relationships: <ul style="list-style-type: none">• Some of my friends are social workers and some are lawyers and accountants. We are all drawn together by the pursuit of minimizing class differences and privilege.	We volunteer as a team and usually adopt one charity a year. All of us work together to support it over the 12-month period. In fact, a good friend of mine now sits on the board for one of our special charities.