

Job Announcement

Job Title: Senior Investment Officer

Location: Washington, DC

Company Summary:

Opportunity Finance Network (OFN) is a leading national network of CDFIs (community development financial institutions) headquartered in Washington D.C. In pursuit of our mission to align capital with social, economic, and political justice, OFN supports its 300+ member CDFIs with money, strength, and voice to drive transformational change in underserved rural, urban, and Native communities nationwide. We help money flow to people and places where traditional finance doesn't reach.

OFN builds the strength of its membership and other CDFIs through financial products and services, events, training, research, policy advocacy, and visibility. Currently, OFN manages more than \$750 million in capital and offers a range of products and services to help CDFIs lend and invest in markets underserved by mainstream banks.

To learn more, visit www.ofn.org

People who work at OFN come from a variety of professional and academic backgrounds. Be a part of our growing diverse, highly committed, skilled and collaborative staff who are guided by the following values:

- Passion for the mission and true believer in our core purpose.
- Courage to be a fearless advocate who is confident and resilient in our fight to drive capital into low-income communities.
- Smart, quick seekers of knowledge who thrive on creating and developing new strategies, products, and programs for increasing capital to communities we serve.
- Desire to be a collaborative team player who possesses humility and a willingness to lean in all areas of our work.

Position Summary and Essential Functions:

This position is primarily responsible for evaluating new investments and assisting to manage OFN's investments. The successful incumbent will have extensive experience in the CDFI and/or social impact investing industries. The Investment Officer will analyze primarily debt investment opportunities in CDFIs using loan portfolio and financial statement data and in-depth conversations with organizations' senior management teams. Will be responsible for providing recommendations for investment opportunities, and industry best practices to OFN's CDFI members. Through attending conferences and events, this position will develop relationships with OFN's members and work across OFN's teams to support OFN's mission.

Responsibilities include:



- Generate loan and investment opportunities by developing relationships with OFN's CDFI members.
- Prepare and present impact, credit, and financial risk analyses memorandums to OFN senior leadership and respective investment committees.
- Analyze CDFIs' financial statements, loan portfolios, lending policies and procedures, management teams, and strategies to determine the degree of risk involved in extending credit, as well as recommend risk mitigation strategies.
- Identify and recommend industry best practices in operations to OFN members.
- Generate financial ratios and models to evaluate borrowers' current and prospective financial status.
- Actively participate in the portfolio management of OFN's investments. Ensure borrowers maintain compliance with quarterly covenants and strengthen borrower relationships.
- Coordinate with team members to complete loan closings, documentation, and fund disbursements.
- Collaborate with the financial services team to maintain accurate borrower and loan information.
- As part of the financial services team, develop and implement investment strategies and investment policies and procedures. Support OFN's participation in the CDFI Bond Guarantee Program as requested.
- Will supervise a junior staff member.
- Work across OFN's teams to support OFN's mission.

Qualifications:

- Bachelor's Degree or 7-10 years direct work experience in lieu of degree.
- 7+ years of experience working at CDFIs, consulting in the CDFI sector, or similar social impacting investing industries is required.
- 7+ years demonstrated experience with financial statement analysis, financial modeling, and credit analysis, including underwriting, is required.
- Demonstrated experience writing and presenting detailed investment recommendations with emphasis on clarity, conciseness, and relevance.
- Experience with loan management systems and CRMs (Customer Relationship Management software) a plus.
- Must possess a strong passion for, understanding of, and commitment to OFN's mission, vision, and values. In addition, be a fearless advocate, who is confident and resilient in OFN's fight to drive capital into low-income communities.
- A collaborative team player who possess the interpersonal skills to work across all levels of the organization, humility, and a willingness to learn in all areas of our work. Be a strong team contributor, effective and comfortable in leading as well as supporting roles within teams.
- Be a smart, quick seeker of knowledge with the ability to think strategically, creatively, and tactically to analyze results and assist in implementing plans for increasing capital to communities we serve.
- Solid understanding of accounting principles with ability to apply knowledge to assessing risk and performing financial underwriting.
- Demonstrated leadership ability with superior interpersonal skills and ability to work well with diverse constituents.



- Superior organizational skills and ability to manage multiple tasks effectively and efficiently under minimal supervision as well as ability to set priorities and meet deadlines under pressure without sacrificing quality.
- Understanding of loan documentation and risk mitigation strategies.
- Intermediate knowledge of MS Excel and financial modeling skills.
- Knowledge of Salesforce is a plus.
- Digital literacy and ability to navigate workplace technology.
- Ability to work both independently and collaboratively with teams across OFN.
- Comfort working in a small-office environment and/or experience working in a nonprofit environment preferred.
- Some travel required (15% of time).
- Job involves normal physical requirements for an office position.

EOE/AA/D/V

Supervisor's Title: SVP, Financial Services FLSA Status: Exempt

To apply please visit: <https://theapplicantmanager.com/jobs?pos=OF167> to complete an application.