



Position: Equity Investment Advisor
Department: Business Consulting
Position Type: Pro Bono Advisor
Commitment: Minimum of 12-months; 3 hours per month
Reports to: Director of Business Consulting
Start Date: January 2017

Organization:

Working Solutions (www.workingsolutions.org) is a Community Development Financial Institution (CDFI) whose mission is to provide microentrepreneurs with the access to capital and resources they need to start or grow a successful business. We serve a diverse population, but prioritize serving low-income individuals, women, and minorities. We provide small business loans (microloans) from \$5,000 up to \$50,000 and post-loan business consulting for the term of the loan.

Department:

Working Solutions provides business consulting to the borrower, in order to build the business owner's financial acumen and to strengthen the business. Support is provided to all borrowers for the term of their loans (between 3-5 years). The Business Consulting department provides financial consultation to the business owner, and coordinates additional resources as needed, including: exclusive events, tailored business education, increased exposure, and access to experts.

Pro Bono Advisor Overview:

Pro bono advisors are an integral aspect of the Business Consulting Program. Advisors work directly with small business owners to impart their expertise. The scope of the advisor/advisee relationship is specific to each client you work with and is determined by you and the client. Advisor hours are capped at 10 hours/ client. Some engagements are a simple phone call, whereas other advisors work with advisees on an on-going basis. The advisor relationship is consultative in nature and advisors are not expected to engage in implementation.

Responsibilities:

- Advise small business owners via in-person meetings, phone consultations, and/or email
- In concert with the client, determine a schedule for follow-up meetings, (if any)
- Relay a high level summary of work with client to the Director of Business Consulting on a monthly basis
- Track and submit the number of hours spent advising a client; submit monthly

Process:

- Business Consultants (BC) meet with clients on a quarterly basis to discuss business goals and to identify the resources needed to achieve those goals.
- The BC will determine if a client is a fit for your area of expertise. If so, the BC will email you to check your availability and to give you a brief overview about the business and its area of need.
- The BC will introduce you to the client via email, encouraging to client to reach out to you to schedule your first meeting
- The Director of Business Consulting will reach out monthly to inquire about your experience and to request the hours you spent advising the client.

Desired Skills & Abilities:

- Knowledge of the different types and stages of equity investment, including: friends & family, angel, and Series A
- Experience in building or reviewing pitch decks
- Ability to advise on term sheets, (from an economic and/or legal lens)
- Knowledge of cap tables and investor relations
- Knowledgeable about the startup landscape, including: accelerators, pitch nights, and angel groups



Qualifications:

- 5+ years of experience in area of expertise
- Prior business ownership
- Ability to communicate effectively and establish and maintain professional relationships with individuals of varying social and cultural backgrounds and with co-workers at all levels.
- Sensitivity to issues facing low income business owners with diverse backgrounds
- High integrity, responsiveness, professionalism and personal boundaries

If you would like to learn more about the opportunity to advise our small business clients, contact Director of Business Consulting, Jaclyn Anku: jaclyn@workingsolutions.org; 415-730-2384.

To apply, please email resume with the subject line “Pro Bono Equity Investment Advisor” to Director of Business Consulting, Jaclyn Anku: jaclyn@workingsolutions.org