



Position Description

Position Title	Department
Analyst	Esplanade – SVX
Reports to	Titles of Direct Reports
Senior Director – Esplanade – SVX Quebec	

ABOUT Esplanade - SVX

SVX is an impact investing platform for ventures, funds, and investors seeking social and/or environmental impact alongside the potential for financial return. We provide a single access point for raising capital and making investments. In Quebec, SVX has partnered with Esplanade to catalyze and support an ambitious community of change makers, organizations and citizens who collectively address the social, environmental and economic challenges of today. The Esplanade is the first accelerator and collaborative space dedicated to entrepreneurship and social innovation in Quebec

We work across sectors including cleantech, health, education, food, and social inclusion, providing capital raising support to issuers from enterprises focused on early cancer detection to community power co-operatives producing renewable energy. We work with all investors, from foundations and family offices to everyday investors, to help them identify opportunities and to support their decision-making efforts so they can match their money with meaning. SVX is a not-for-profit entity, incorporated in Canada. SVX is registered as an Exempt Market Dealer (EMD) with the securities commissions in Ontario, Quebec, British Columbia, Alberta and Saskatchewan, however, no securities regulatory authority has approved or expressed an opinion about the securities offered on this platform.

PURPOSE & OVERVIEW OF POSITION

The Analyst is primarily responsible for reviewing current and prospective ventures, funds and organizations and their investment offerings for the SVX platform.

The Analyst will identify and review venture and fund opportunities by working with partners and team members to recruit prospects and supporting intake and due diligence for prospective SVX issuers. The review process includes document collection, financial analysis, risk analysis, background checks, impact analysis, and analysis of impact investment offerings. The Analyst will also support investor intake and reviews, and manage our venture and investor client database.

LOCATION

This position is based at l'Esplanade in Montreal. There may be travel to project partner locations for meetings and events.

RESPONSIBILITIES

The Analyst is responsible for the following activities and deliverables:

- **Venture and fund review (55%)**
 - Work with pipeline partners and SVX team members to recruit quality ventures;
 - Support venture intake and due diligence including the initial and ongoing Know Your Product (KYP) requirements for all SVX issuers. KYP requires document collection,

financial analysis, risk analysis, background checks, impact analysis, and analysis of impact investment offerings.

- **Investor client management and analysis (20%)**
 - Develop and maintain knowledge of the SVX venture offerings, keep up-to-date knowledge on regulatory requirements and industry environment;
 - Manage client information including initial and ongoing Know Your Client (KYC) documentation and reviews for investors, including accredited, eligible, and non-accredited investors;
 - Support suitability for investors to ensure transactions align with the investor profile and Canadian regulatory requirements;
 - Receive and respond to client requests and inquiries; and
 - Act as a Dealing Representative for our in-house Exempt Market Dealer (EMD), MaRS VX.
- **Reporting and tracking (20%)**
 - Manage venture and investor client database including maintenance of necessary documentation for and from clients.
- **Other (5%)**
 - Help to coordinate investor webinars and events including pitch events, networking events, and investor events;
 - Attend team meetings, meet bi-weekly with project supervisors, meet regularly with SVX colleagues and attend SVX-wide staff and Esplanade meetings; and
 - Contribute to the strategy and vision for MaRS VX and Esplanade.

QUALIFICATIONS

- Post-secondary degree;
- Two (2) years business experience in a similar role preferred but not required;
- A background in investment analysis, financial analysis, venture analysis and data collection;
- Understanding of early stage investing and the exempt market is an asset;
- Demonstrated interest and passion in impact investing;
- Excellent interpersonal and communications skills (verbal and written);
- Bilingual – French and English;
- Strong capabilities in MS Word, PowerPoint and Excel. Salesforce experience an asset;
- Collaborative team player who thrives on coordinating and interacting with multiple people and on multiple projects and who is able to manage shifting priorities;
- Excellent organizational, planning and time management skills: ability to manage details and organize processes without losing sight of the big picture;
- A self-starter with personal accountability and a commitment to achieving and exceeding goals and objectives;
- Flexibility and adaptability to seize new opportunities and change existing programs to further meet and exceed clients' needs;
- Canadian Securities Course (CSC) or Exempt Market Proficiency (EMP) course is recommended but it is not required.

WORKING CONDITIONS

General office environment with operating business hours of 8:30am to 5pm Monday to Friday

Please send your CV at the following address: careers@svx.ca before May 5, 2018.