



Mission | PeopleFund creates economic opportunity and financial stability for underserved people by providing access to capital, education, and resources to build healthy small businesses.

Small Business Advisor

Job Description:

PeopleFund is seeking an innovative and programmatically creative individual to serve as a Small Business Advisor for our clients. This role will focus on developing post-loan support programming for borrowers. This may include a variety of the following functions: serving as our borrower point of contact (post-loan), onboarding new borrowers to education and support services, coordinating site visits and tracking SBA compliance, updating the online education portal, and planning programs specifically to serve the needs of borrowers throughout the life of their loan. The Strategic Advisor will guide business owners in a variety of capacities to create real, lasting change by partnering on the macro, micro, and long-term goal of economic development (access to capital and job growth). The individual filling this role must be able to work with some level of initiative and autonomy in order to fulfill responsibilities.

Duties and Responsibilities Include:

- Serve as the primary point of contact and manage a portfolio of up to 200 PeopleFund borrowers for technical assistance:
 - Reviewing quarterly financials (profit and loss, cash flow, and balance sheet statements),
 - Track small businesses' sustainability by meeting with client caseload via a site visit 18-24 months after obtaining their loan with PeopleFund (some travel is required in this role),
 - Monthly touchpoints with your clients (can include a tailored newsletter, targeted emails, phone calls, etc.),
 - facilitate group and online training,
 - A minimum of 2 advising sessions per client annually (in person or virtual) on any of the following topics:
 - Business planning
 - Market research
 - Financial Statements (profit and loss, cash flow, and balance sheet statements),
 - Access to capital,
 - Personal and business credit,
 - Operations
 - Marketing
 - Financial forecasting
 - Assisting in the development of updated curriculum (via Tovuti modules, manuals, presentations, etc.)
 - Create and facilitate Microloan borrower virtual communities in Tovuti,
- Works closely with the lending and risk management teams to provide post-loan support and technical assistance to small business owners
- Track and report all technical assistance provided monthly on a cloud server

- Work with partner agencies (SCORE, SBDC, Chambers of Commerce, etc.) in the designated region to coordinate and provide post-loan technical assistance
- Maintain working knowledge of ongoing small business opportunities and resources
- Connect clients to professional resources in the community to help meet their business needs
- Lead workshops for clients and partners
- Collaborate with resource partners in the Small Business Ecosystem on outreach, events, and workshops
- May be required to attend events and engagements both during normal working and outside of normal working hours
- Track set metrics for job evaluation and community impact monthly
- Other duties as assigned

Requirements:

- 3+ years of business startup experience or working with small business owners
- 1+ years consulting, coaching, or advising small business owners
- Subject matter expert in the following core topics:
 - Business planning
 - Market research
 - Financial Statements (profit and loss, cash flow, and balance sheet statements)
 - Access to capital
 - Personal and business credit
 - Operations
 - Marketing
 - Financial forecasting
- Experience managing partner, vendor, and contractor relationships
- Experience with compliance management
- Experience with client case management
- Proficient in Microsoft Office 365
- Employment offers are subject to acceptable driving record, credit, background, and reference checks
- Ability to work between 9:00 am and 6:00p m, Monday through Friday with flexibility to work outside of those hours to support events and client needs.

Employee Benefits - PeopleFund provides the following benefits for employees:

- Medical, dental, vision, and life insurance coverage. PeopleFund pays up to 100% for employee only
- Paid Time Off starting at 3 weeks per year and 12 paid holidays
- 401 (k) retirement plan with match and immediate vesting
- Flexible Spending Account (FSA) and Health Savings Account (HSA) available for qualifying medical pans and expenses
- Dependent Child Care Spending Account available to employees who qualify
- PeopleFund is a Hybrid Work Company

True to our Mission, PeopleFund is committed to recruiting and retaining a diverse staff, and to creating a respectful workplace anchored in a deep, shared commitment to diversity, equity and inclusion: we are proud to be an equal opportunity employer. PeopleFund welcomes applications from all qualified persons, including underrepresented groups who can contribute to our Team's capabilities as we work together to meet the needs of underserved communities.