



Job Title:	Investor Relations Coordinator
College:	California Northstate University
Faculty/Staff:	Staff
Classification:	Non-Exempt
Status:	Full-Time
Location:	Elk Grove
Reports To:	Chief Financial Officer
Supervisory Responsibility:	None/
Revised Date:	

Description:

The Investor Relations position is within the finance department at California Northstate University, Elk Grove, CA. Investor relations (IR) responsibility that is capable of integrating finance, communication, marketing and securities law compliance to enable the most effective two-way communication between a company, the financial community, and other constituencies, which ultimately contributes to a company's securities achieving fair valuation. The term describes the department of a company devoted to handling inquiries from shareholders and investors, as well as others who might be interested in a company's stock or financial stability.

Responsibilities:

- 1) Ensure all investors have an outstanding experience from the first interaction to the last
- 2) Coordinate all address changes between investors, external CPA, and CNU
- 3) Keep contact with external TAX CPA to update the Investor's profile (contact info) and keep all communication emails in filing system under one secured driver (only EA to the CFO & CFO & Controller will have access, for confidential purposes)
- 4) Communicating, organizing events and activities, develop and schedule reactive investment community interactions, meetings with appropriate notices
- 5) Assist with the development of critical Investor Relations content, including, but not limited to, quarterly earnings releases and Board update presentations, annual stockholder meeting materials, reports, and periodic CFO Commentaries Sending K1 tax filing required documents
- 6) Build up the investors' profile per entity and have a documentation system to keep investor's profile & updated info update date (address, tax info, and other contact information)
- 7) Support investor and donor onboarding, maintain up-to-date records and manage related documentation



- 8) Work closely with the Executive Assistant to the CFO to maintain accurate addresses, emails, and phone numbers for all investors and its affiliates
- 9) Collect and manage sensitive data and information
- 10) Support investor and donor onboarding, maintain up-to-date records and manage related documentation
- 11) Provide printed instructions from accounting related verifiable transfers
- 12) Develop the investor relationship maintenance system, to better serve the shareholders (including forms & documents & any other required procedures)
- 13) Develop thoughtful targeting analyses to facilitate executive meetings with current and/or prospective institutional stockholders
- 14) Source data and build presentations for investor meetings
- 15) Timely notify the Finance Department/EA to the CFO to update contact info to shareholder profile in the accounting system's
- 16) Meet regularly with the Chief Financial Officer and other CNU executives as well as members of the investment community
- 17) Establish rapport with members of the investment community
- 18) Solicit funds for scholarship foundation
- 19) Serve as a liaison between investor relations and other company teams
- 20) Assist in maintaining and updating systems for onboarding & retaining investors
- 21) Assist in the preparation and distribution of internal and external reports (including k1 distribution)
- 22) Handle concurrent workstreams with a high degree of organization and passion
- 23) Improve your understanding of CNU's mission and financial model to support the university in addressing inbound questions prospective investors
- 24) Maintaining accurate contact information for investors, such as address, cell-phone and email addresses.
- 25) Any other assignments from CFO regarding investor or shareholder issues

Qualifications:

1. Outstanding analytical skills, creativity in problem solving, research capabilities, and attention to detail
2. Strong communication skills, both written and verbal, as well as the ability to develop concise and effective communications tailored to specific audiences
3. While prior experience in the financial services industry is not required, we prefer that candidates demonstrate a strong interest to work in the financial services sector
4. Previous Investor Relations experience is a plus, but not a prerequisite



Education:

1. Bachelor's degree with 1–3 years of work experience preferred, but relevant coursework could serve as substitute in certain cases – advanced degree or industry certification a plus

Working Conditions:

1. Must be willing to work in the office during regular scheduled hours

Applications will be reviewed upon receipt. For full consideration, candidates should provide resume with at least three references. All candidates are asked to provide a cover letter, articulating how their knowledge, experience, and beliefs have prepared them to function in support of California Northstate University's vision and mission statements. Please submit your cover letter, resume, list of references, and any additional information to hr@cnsu.edu . Review of applicants will begin immediately and will continue until position is filled. California Northstate University is an Equal Opportunity and Affirmative Action Employer. All qualified candidates are encouraged to apply.