



## **POSITION DESCRIPTION: Investment Officer**

### **ORGANIZATION:**

Established in 1980 by Leon Levine, founder and former chairman of Family Dollar Stores, Inc., **The Leon Levine Foundation** empowers underserved Carolinians to be self-sufficient and strengthens Jewish communities.

Based in Charlotte, N.C., the Foundation creates impact through grants and investments across North and South Carolina, as well as mission-aligned investments nationally. The Foundation is on a time-bound mission to strengthen children and families, build strong futures for hardworking adults, and cultivate vibrant Jewish communities. Guided by Mr. Levine's vision, the Foundation's philanthropy is anchored in four enduring areas of impact: education, healthcare, human services, and Jewish values.

**L&L Management, Inc.**, is a family office formed in 2005 to manage the financial, investment and administrative needs of individual family members and related entities, including The Leon Levine Foundation.

TLLF & L&L Management seek employees from diverse backgrounds, faiths, and life experiences to join the team. The Foundation strives to create an equitable workplace where all good ideas rise to the top. For more information, please visit [www.leonlevinefoundation.org](http://www.leonlevinefoundation.org).

### **OPPORTUNITY:**

The Leon Levine Foundation and L&L Management (collectively, "TLLF") seeks to hire an Investment Officer to help lead the day-to-day execution, monitoring, and continued development of the Foundation's investment strategy. The position will be based full-time in TLLF's offices in Charlotte, North Carolina.

The Investment Officer will be a senior member of the Investment Team responsible for sourcing, underwriting, recommending, executing, and monitoring investment opportunities.

The Foundation's investing activity is closely aligned with its grantmaking priorities. The Investment Officer will lead investments across Healthcare and Education, generally through Venture Capital and Private Equity strategies, as well as Human Services (Quality Jobs and Affordable Housing) and Jewish Community investments through Private Equity, Credit, and Real Estate.

The Investment Officer will focus primarily on private markets, including fund commitments, re-ups, co-investments, and select direct investments (generally in real estate). They will prioritize market-rate impact investments but also evaluate closely aligned and/or place-based impact-first opportunities.

The Investment Officer will partner closely with the Investment Team, Program Team, and Research Staff to translate the Foundation's investment objectives and programmatic priorities

into actionable impact investment recommendations.

This role will supervise and develop junior investment professionals, manage relationships with external managers and partners, lead due diligence processes, and ensure that investments support both long-term financial returns and The Foundation's mission goals.

The Investment Officer will present investment work and recommendations to Senior Leadership and will prepare materials for Board and Finance Committee review.

**REPORTS/RELATIONSHIPS:**

This position will report to the Director of Investments.

**FUNCTIONS:**

Specific duties will include, but not necessarily be limited to:

- Collaboration and Engagement
  - Serve as a liaison between the investment and program teams, aligning workflows and sharing insights across functions.
  - Build and maintain strong relationships with key internal stakeholders, including staff for grants, research and development, and accounting.
  - Provide training and support to junior team members and other Foundation stakeholders as needed.
  
- Investment Strategy, Portfolio Construction & Team Leadership
  - Partner with the Director of Investments to translate the Foundation's investment strategy, asset allocation, mission goals, and risk/return objectives into actionable portfolio priorities and workstreams.
  - Develop and refine investment theses within assigned portfolio areas.
  - Lead thematic research and oversee research prepared by junior staff, ensuring insights are clear, rigorous, actionable, and connected to portfolio priorities.
  - Supervise, coach, mentor, and evaluate junior investment professionals.
  - Foster a team culture of intellectual rigor, collaboration, accountability, humility, and continuous learning.
  - Prepare materials for Senior Leadership, Board, and Finance Committee review, present investment recommendations, portfolio updates, and research to Senior Leadership.
  
- Investment Sourcing, Due Diligence & Execution
  - Source, evaluate, and lead diligence on new investment opportunities, including funds, re-ups, co-investments, and select direct investments.
  - Evaluate co-investment opportunities alongside existing or trusted managers as well as direct opportunities where applicable.
  - Prepare decision-ready investment memoranda, presentations, and recommendations for review by the Director of Investments and Senior Leadership.

- Coordinate with Operations, Legal, Tax, consultants, investment managers, and other external advisors on investment structuring, documentation, approvals, closing, and ongoing administration.
- Portfolio Management, Monitoring & Reporting
  - Own monitoring and portfolio management for private investment managers.
  - Conduct ongoing diligence on existing managers, companies, and investment partners.
  - Evaluate capital calls, distributions, valuations, cash flow projections, and liquidity needs in partnership with the Operations Specialist and Accounting Team.
  - Ensure accuracy and completeness of records, dashboards, pipeline tools, and reporting materials.
  - Identify and communicate key portfolio developments, risks, opportunities, and recommended actions to the Director of Investments and Senior Leadership.
- Mission Integration & Impact Measurement
  - Integrate mission and impact considerations into manager sourcing, selection, and monitoring, as well as in portfolio construction.
  - Partner with Program Teams as a senior investment liaison, ensuring that program insights inform investment strategy and that investment insights support program strategy.
  - Translate programmatic priorities, field knowledge, and community insights into investable themes, diligence questions, manager evaluation criteria, and impact measurement approaches.
  - Support development and refinement of impact frameworks, metrics, and reporting practices for assigned portfolio areas.
  - Incorporate impact data and mission-alignment considerations into portfolio reviews, investment memos, and reporting materials.
  - Facilitate internal learning and knowledge sharing across Investment, Program, Operations, Finance, and other Foundation teams.
- Stakeholder & Partner Engagement
  - Build and maintain strong relationships with investment managers, consultants, co-investment partners, operating partners, peer foundations, family offices, institutional investors, and other market participants.
  - Represent the Foundation externally at manager meetings, annual meetings, industry conferences, peer convenings, and LP advisory committees.
  - Serve as a thoughtful and credible representative of the Foundation's investment approach, mission, values, and long-term orientation.
  - Support external meetings, convenings, and events that advance the Foundation's investment strategy, relationships, and learning agenda.
- Compliance, Risk Management & Governance

- Collaborate with the Operations Specialist, Director of Investments, consultants, and external advisors to monitor risks across assigned portfolio areas and compliance with investment policies and processes.
- Ensure investment activity is conducted with strong judgment, discipline, discretion, and integrity.

*The responsibilities above describe the primary areas of focus for the role and are intended to complement the Foundation's internal job description framework.*

#### **QUALIFICATIONS:**

- 8+ years of relevant investment experience, preferably in banking, finance, private equity or impact investing.
- Bachelor's degree and relevant master's degree or CFA required. Equivalent experience from a relevant institutional investment setting may be considered in exceptional cases.
- Track record of investment sourcing, underwriting, diligence, evaluation, portfolio monitoring, and recommendation development.
- Experience evaluating private markets investments required; experience with co-investments and direct investments is strongly preferred.
- Experience managing, mentoring, and developing investment professionals.
- Experience preparing investment memoranda, portfolio updates, and senior-level presentation materials.
- Familiarity with mission-aligned investing, impact investing, philanthropy, community investment, or values-aligned capital is a plus.
- Willingness and ability to travel for manager meetings, annual meetings, conferences, site visits, and convenings.

#### **BENEFITS**

- Competitive salary and discretionary grant pool
- Eligible for review and performance-based compensation adjustment each June 30
- 401(k) with 8% company contribution (5% match, 3% profit share)
- Fully paid employee health insurance, dental, vision, disability, and life insurance. 75% premium paid dependent health insurance, vision and dental
- 20 days of annual leave, prorated for the first year and increases to 25 days after 2 years of service, along with 10.5 paid holidays and paid sick leave
- Professional development allowance to support ongoing career growth
- Student Loan Repayment of \$100 per month, up to \$1,200 yearly with a \$10,000 lifetime max
- Lifestyle Spending Account
- Opportunity to work on meaningful projects that make a real difference in the world
- Collaborative and supportive work environment
- Professional development opportunities

The Leon Levine Foundation supports an environment that is free of harassment and retaliation and does not discriminate on the basis of race, color, religion, sex, national origin, disability, veteran status, age, or any other status protected by federal, state, or local laws.