

Job Summary

Company:	Excelsior Growth Fund
Location:	New York, NY
Industries:	Financial Services
Job Type:	Employee - Full Time
Title:	Senior Business Advisor

About the Company

The Excelsior Growth Fund (EGF) is a non-profit Community Development Financial Institution (CDFI) and lender that provides innovative financial products and business advisory services to underserved small businesses in the state of New York and is an affiliate of New York Business Development Corporation (NYBDC).

About the Job

The Senior Business Advisor is responsible for working directly with clients to coordinate the implementation of business advisory services, and to help overcome business barriers to ready clients for accessing capital. The Senior Business Advisor is also responsible for developing and managing partnerships to deliver services and secure client referrals. As such, the position has both business consulting and business development responsibilities.

Duties and Responsibilities:

- Conduct business assessments and develop work plans that address business needs.
- Use good judgment to provide high impact counseling and training to clients, with a focus on loan readiness, loan packaging, addressing challenges to accessing capital, helping to take advantage of business opportunities to help grow the business and create jobs, etc.
- Coordinate partnership development and serving clients in conjunction with the organization's key partners and other small business service providers, including NYC Business Solutions, the NYS Small Business Development Center Network, chambers of commerce, associations, and other organizations.
- Develop manuals, processes and procedures; establish benchmarks and track client progress against benchmarks.
- Provide recommendations for improvement of the program and implement those improvements.
- Conduct follow-up assessments and check-ins with clients.
- Manage program initiatives to ensure quality service and work, together with other staff, to ensure that all EGF goals and funder goals are met or exceeded.
- Act as a liaison between EGF and the mentors, experts and contractors that work with the business, including working with them to ensure professional-quality advice, guidance and data is being applied to the engagement.
- Manage reports and IT systems related to tracking and reporting on business advisory services engagements.
- Participate in the development and implementation of written advisory materials and workshops/seminars.
- Perform research and program development tasks as necessary.

- Additional position related duties and responsibilities as assigned by supervisor.

Position Specifications:

- Bachelor's degree required.
- Master's degree in business administration, public administration, or related field preferred.
- Minimum of three (3) years' experience in small business lending, technical assistance, or consulting services.
- Superior business consulting, technical and writing skills.
- Clear communication, presentation & interpersonal skills.
- Familiarity with public, private and nonprofit small business support initiatives, community partners and stakeholders.
- Strategic & organizational competence—i.e. exercising leadership to improve program design and the quality of business advisory services, the ability to set and manage timelines, commitments, and deadlines with ease.

Essential Functions:

- Ability to communicate effectively.
- Ability to travel throughout the greater NYC region.
- Ability to speak publicly.

We are an Equal Opportunity Employer and comply with all applicable federal, state and local laws regarding nondiscrimination. We provide equal opportunities to all employees and applicants for employment without regard to race, color, religion, gender, sexual orientation, national origin, age, disability or protected veteran status.