

EQUITY SHIFT

Customer Onboarding Specialist

Location: Raleigh, NC / Remote

Classification: Full-Time

Company Description: Equity Shift provides next-generation fintech software that makes it easier for private companies to buy, sell, and transfer their securities. Our mission is to give operators (CEO, CFO, Counsel, etc.) enhanced capabilities at all stages of their company's life cycle. Our vision is a private market where everyone has greater freedom of choice. Equity Shift's BITE™ platform is patented and licensed by FINRA (CRD #309841) as a secondary trading marketplace for restricted securities.

We're led by an expert team with 100+ years of relevant experience in software development, capital markets, corporate transactions, banking, and securities law. This is an opportunity to gain direct access to the world of private equity and work alongside leaders of the \$100B+ (and growing) annualized secondaries market.

Job Description: The Operations team at Equity Shift is responsible for owning, managing and supporting the success of our direct customers (private companies). The Onboarding Manager will work closely with new customers to ensure that their adoption of Equity Shift is indicative of a world-class service experience.

Ideal candidates will demonstrate the ability to quickly and effortlessly conduct customer due diligence (KYC) and data integration with a high level of financial acumen. The Onboarding manager will be responsible for ensuring the accuracy of customer information and readiness to conduct private equity transactions.

What You'll Do (Job Requirements):

- Drive Customers through the onboarding process
- Perform legal due diligence of new Customers and owners
- Setup of new Customer environments
- Understand, demonstrate, and prescribe software features to Customers
- Assist Customers with securities transactions and other corporate events

What You'll Need (Key Skills):

- Critical thinking: Ability to listen, ask relevant questions, and solve problems.
- Excellent decision making and leadership capabilities.
- Self-starter attitude: Able to work productively with little formal guidance.
- Excellent presentation, communication, and relationship building skills.

- Ability to communicate and collaborate effectively with a variety of internal and external stakeholders, across a wide spectrum of experience with the concepts and practical application of private finance, technology, and securities regulation.
- Highly organized with the ability to maintain simultaneous work streams.

Desired Education and Experience:

- Bachelor's degree required.
- 5+ years of experience delivering SaaS software to enterprise customers.
- Experience with private companies and corporate transactions preferred.
- Proven track record of positive customer experiences.
- FINRA licensing required within 90 days of employment.

What We Offer (Compensation):

- Market competitive base salary and company ownership.
- Flexible location and working hours.
- Competitive vacation and holiday schedule.
- Full employee healthcare benefits.

Equity Shift is an equal opportunity employer and is committed to providing a positive interview experience for every candidate. As a company we value diversity, inclusion, and equal access to life-changing opportunities. Every day we work to exhibit fairness, helpfulness, transparency and leadership in our community. We build our teams around these values.

Please email careers@equityshift.com to start your next step with Equity Shift.