

# EQUITY SHIFT®

**Job Title:** Chief of Staff

**Location:** Raleigh, NC

**Classification:** Full-Time

**Company Description:** Equity Shift is a trusted provider of 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 lifecycle. Our vision is a private market where everyone has greater freedom of choice. Equity Shift's BITE® platform is patented and licensed by FINRA as a secondary trading marketplace for restricted securities, eliminating the complexity of private market operations by automating the entire process lifecycle. 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.

At Equity Shift, we've cultivated a vibrant culture that values passion, curiosity, and collaboration. By fostering an environment of open communication and mutual respect, we harness the unique strengths of each team member to drive innovation and excellence. We take pride in our ability to deliver exceptional outcomes that drive our customers' success while nurturing the potential of every individual involved.

**Job Description:** The Chief of Staff at Equity Shift plays a pivotal role in ensuring the operational efficiency and strategic execution of key initiatives across the organization. Reporting directly to the CEO, the Chief of Staff will act as a trusted advisor, project manager, and cross-functional liaison to drive alignment and decision-making. This position requires a strategic thinker with strong leadership,

organizational, and communication skills, coupled with an exceptional ability to manage priorities and influence outcomes.

## **Key Responsibilities**

### **Executive Support**

- Partner with the CEO and executive team to ensure alignment on strategic priorities and company goals.
- Prioritize meetings and prepare briefing materials for key engagements.

### **Cross-Functional Coordination**

- Act as a liaison between departments to ensure seamless communication and collaboration.
- Identify and address bottlenecks, conflicts, or misalignments in workflows.
- Represent the CEO in meetings and forums as needed, ensuring follow-up on action items.

### **Operational Excellence**

- Lead onboarding processes for new hires and assess productivity and learning progress.
- Manage company-wide initiatives such as all-hands meetings, leadership retreats, and special events.
- Streamline and enhance internal processes to improve organizational efficiency.

### **Leadership and Mentorship**

- Serve as a mentor and resource to team members, fostering a culture of accountability and high performance.
- Support the professional development of key staff by identifying growth opportunities and providing constructive feedback.

## **Qualifications and Skills**

- Exceptional critical thinking and problem-solving skills.
- Strong leadership and decision-making capabilities.
- Self-starter attitude with the ability to work productively with minimal guidance.
- Excellent presentation, communication, and relationship-building skills.
- High emotional intelligence and ability to manage relationships across a diverse set of stakeholders.
- Strong organizational skills and the ability to manage multiple priorities simultaneously.

## **Desired Education and Experience**

- Bachelor's degree required; advanced degree (MBA, JD, or equivalent) preferred.
- 7+ years of experience in a leadership, consulting, or strategic planning role.
- Proven track record of driving organizational success through operational and strategic initiatives.
- Familiarity with private equity, corporate transactions, or fintech preferred.
- FINRA licensing required within 90 days of employment.

## **What We Offer (Compensation)**

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

Interested candidates are invited to submit their resume and a cover letter detailing their qualifications and leadership experience to [careers@equityshift.com](mailto:careers@equityshift.com).