



**Job Title:** Customer Success Associate

**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 **Customer Success team** at Equity Shift is responsible for owning, managing, and supporting the success of our direct customers (private companies). The Customer Success team works closely with new customers to ensure their adoption of Equity Shift is indicative of a world-class service experience. The ideal candidate will be a customer-focused, organized, and proactive individual who can assist customers with the private equity transaction process.

## **Key Responsibilities**

- **Customer Onboarding:** Guide new customers through the onboarding process, assisting with the collection of legal due diligence and Know Your Customer (KYC) documentation.
- **Customer Support:** Serve as a primary point of contact for customer inquiries, providing accurate and timely assistance via email and phone.
- **Customer Advocacy:** Advocate for customer needs by collecting feedback and collaborating with internal teams to help refine workflows and improve the customer experience.
- **Operations & Due Diligence:** Assist with the accurate setup of new customer environments and ensure customer information is complete and correct.
- **Software Adoption:** Help customers understand, navigate, and get the most out of the Equity Shift platform.

## **Qualifications and Skills**

- **Problem-solving:** The ability to listen, ask relevant questions, and assist in solving customer issues.
- **Communication:** Excellent communication and relationship-building skills, with the ability to clearly explain complex information to a variety of stakeholders.
- **Organization:** Highly organized with the ability to manage multiple tasks and prioritize work effectively.
- **Teamwork:** A strong team player who is willing to take initiative and work collaboratively with others.

## **Desired Education and Experience**

- Bachelor's degree required.

- 2–3 years of experience in a customer-facing role, preferably at a SaaS or technology company.
- Experience with due diligence, corporate transactions, or private companies is a plus, but not required.
- Proven track record of building positive customer relationships.

**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 to [careers@equityshift.com](mailto:careers@equityshift.com).