

# Friends Fiduciary Corporation

## Shareholder Advocate

### Position Description

## Position Overview

Friends Fiduciary Corporation, a dynamic, Quaker values-aligned, non-profit investment manager, is seeking a Shareholder Advocate to build on our success in driving positive social, environmental and financial impact among the companies in our portfolios.

In addition to taking the lead on our shareholder engagement strategy, which leverages our large and growing pool of assets to enter dialogues with some of the largest companies in the world, the Shareholder Advocate will actively manage and advance dozens of engagements each year, stay current on key social and environmental issues, coordinate with investor partners and others in the space, oversee our proxy voting program, and serve as an ambassador for this work with our clients and others.

The successful applicant will be a strategic thinker and self-starter, highly organized, an excellent writer and communicator, and will pair a professional presence with an urgent desire for positive impact in alignment with Quaker values, which include peace, integrity, community, equality and stewardship. This is a central position reporting to the Executive Director in a growing company with a strong team orientation.

Interested applicants should email a resume and cover letter to: Hiring Manager / [info@friendsfiduciary.org](mailto:info@friendsfiduciary.org)

Friends Fiduciary, an equal opportunity employer, is based in Center City Philadelphia at: 1700 Market Street, Suite 1535, Philadelphia, PA 19103.

At Friends Fiduciary, we strive to build a work culture where all employees can contribute their very best and work effectively together without regard to race, ethnicity, physical ability, sexual orientation, religion, gender, job position, or education level.

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## Position Description

**Reports To:** Executive Director

**Direct Reports:** None

**FLSA Status:** Full time

**Work Location:** Hybrid with 3 in-office days required weekly at our Philadelphia office

*Last Updated 5/7/2026*

## POSITION SUMMARY:

The Shareholder Advocate works with the Executive Director and other staff to coordinate Friends Fiduciary's impactful shareholder engagement and policy advocacy work; conduct ongoing analysis of critical social and environmental issues; and assist with marketing and communicating our work in writing and in-person. The Shareholder Advocate will research a broad range of environmental and social issues and corporate practices to identify areas for change that reflect Friends Fiduciary's Quaker values and those of our constituents. They will also help coordinate Friends Fiduciary's work with that of other responsible investors, as well as with the broader community of sustainable investment advocates, researchers, and policy experts. They will help develop the business case for companies to take responsible action on a variety of economic and social justice issues, with particular emphasis on the impacts of corporate activity on climate change, sustainability reporting, good corporate governance, lobbying, human rights, and ethical practices in the financial sector. They will assist in interpreting and communicating the value of this work to FFC stakeholders.

## PRIMARY JOB FUNCTIONS:

- Lead the development of and have primary responsibility for coordination and implementation of the annual shareholder engagement plan.
- Conduct research and analysis on specific companies and a variety of environmental, social and governance issues to support FFC's values-based screening and shareholder engagement work.
- Coordinate and track all corporate engagements, including written correspondence, telephone, and in-person meetings; build shareholder coalitions for companies on which FFC takes lead; dialogue and negotiate with company representatives on issues of concern; draft and file shareholder resolutions; and present resolutions at corporate annual general meetings.
- Coordinate FFC's proxy voting at company annual meetings in support of environmental, social, and governance related proposals consistent with FFC's proxy voting guidelines. Develop recommendations for updating the guidelines as appropriate and to make them accessible to constituents to better communicate FFC's value add in this area.
- Support organizational communications through the drafting and editing of newsletter articles, coordinating with the Communications Manager to communicate shareholder engagement efforts externally, and speaking with the media, and in-person and written communications with Friends Fiduciary constituents and prospects.

## OTHER JOB FUNCTIONS:

- Assist in preparation of FFC's Principles for Responsible Investment (PRI) reporting, interfacing with the Chief Investment Officer, Investment Analyst and Executive Director as needed.
- Assist in communicating FFC services to Quaker meetings, churches and other organizations by writing about and presenting on the value and impact of FFC's shareholder and policy advocacy work on behalf of our constituent investors.
- Represent and support FFC's engagement in shareholder coalitions and with NGO partners and other ESG investor groups (e.g. ICCR, Ceres, IAHR, UNPRI etc.).
- Other duties as assigned.

#### **EDUCATIONAL & EXPERIENCE REQUIREMENTS:**

- Bachelor's degree from an accredited college/university is required.
- One to two years of business, investment, shareholder engagement or related experience.

#### **REQUIRED SKILLS & ATTRIBUTES:**

- Able to plan, prioritize, and organize complex projects, timelines, and team member input to meet deadlines in a multi-tasking, fast paced environment.
- Ability to work independently, take initiative, anticipate requests and respond accordingly.
- Strong strategic and analytical thinking skills.
- Excellent communication, interpersonal, and organizational skills.
- Ability to bring Quaker values, collegiality and professionalism to corporate interactions.
- Good writing, editing, and proofreading skills.
- Team orientation that balances individual contribution and group effort.
- Proficiency in Microsoft Office Suite (Outlook, Word, Excel, PowerPoint).
- Courteous and professional manner.
- Ability to maintain confidentiality and discretion.