

Job Title:	Investments Intern
ADP Job Code:	INVI
Reports To:	Anabel Giron, SR VP, Investments
Management Level:	S3/G1
Exemption Status:	Full-Time, Non-Exempt
Hourly Range	\$30.00 –\$32.97 per hour

Job Summary: Key Job Responsibilities and Duties

This internship is a structured learning experience designed to provide students with exposure to how a philanthropic foundation manages its investment functions. Interns will work closely under the guidance and supervision of CCF staff, consistent with CCF's Internship Policy, which emphasizes that intern training must primarily benefit the intern, with assignments crafted to support learning and professional development. This is an opportunity to observe and participate in real-world processes in a supportive environment—not to perform duties of regular employees. Interns will be coached, supervised, and given meaningful experiences to enhance their understanding of nonprofit investment management.

Primary Duties and Responsibilities

Primary duties and responsibilities in order of most significance.

Learn about fiscal-year reporting and investment operations by assisting staff with selected steps of the process under close supervision.

Observe and participate in team meetings to gain insight into how investment and finance teams collaborate within a foundation structure.

Support the creation of investment reports (monthly and quarterly) by completing guided tasks that teach students how reporting is prepared for stakeholders.

Contribute to supervised learning projects, which may involve research, data gathering, or other educational assignments tailored to the intern's interest areas.

Develop administrative and organizational skills by helping with general tasks that support the team's functions and provide greater exposure to department operations.

General: At all times, demonstrates cooperative behavior with supervisors and coworkers. Other duties as assigned, dependent on organizational needs and employee skills.

Specific Responsibilities

<i>Department</i>	<i>Duties and Responsibilities</i>
Finance and Investments	Maintains confidentiality and sensitivity at all times.
Finance and Investments	Provides a high level of customer service and support across the Foundation.
Finance and Investments	Builds strong relationships with internal and external partners, fostering trust and promoting collaboration.
Finance and Investments	Supports systems and procedures to advance the work of Foundation and employee experience.
Finance and Investments	Supports other duties as assigned by management.

Values & Principles

- Learn and understand the vision and goals of CCF to become its advocate and ambassador.
- Learn all products, services, workplans and metrics of the department and CCF.
- Strive to reach and exceed established personal and professional goals.
- Abide by CCF's policies and procedures and operate with candor, transparency, clear communication, and the highest ethical standards.
- Serve as a team player by working collaboratively with all CCF employees.



- Understand and proactively seek opportunities for internal integration of work across functions and departments to make connections and leverage the strengths and efforts of CCF to maximize its impact.
- Uphold the highest standards of customer service for all CCF constituents in terms of speed of response, accuracy, and completeness.

These statements describe the primary duties and responsibilities of the job and are not intended to be an exhaustive list of all tasks. Other work duties may be assigned at any time with or without notice.

Team Work & Customer Relations Responsibilities

- Establishes effective working relations with cross functional team(s).
- Contributes to a high performing/positive team culture.
- Shares knowledge, time, and expertise to assist other members of team.
- Timely and accurately responds to requests and inquiries from across Foundation.
- Demonstrates "can do" attitude as priorities shift.

Job Qualifications

Education Level	Education Details	Min	Pref
Bachelor's Degree	Recent graduates or current undergraduate students pursuing studies in Finance Economics, Business, or related fields; rising seniors preferred.		X

Skills, Knowledge and Abilities

Skill/Knowledge/Ability	Description	Proficiency
Knowledge Skills	Basic familiarity with Microsoft Excel, with willingness to learn more advanced functions through hands-on guidance.	Advanced
Critical Thinking Skills	Strong curiosity, willingness to ask questions, and enthusiasm for developing new skills	Advanced
Demonstrate	Demonstrate interest in learning about investment management and nonprofit finance	Advanced
Communications	Clear communication abilities and openness to receiving coaching and feedback.	Advanced
Collaborative	Collaborative mindset and a positive, learner-oriented attitude.	Advanced
Analytical Skills	Strong research, analytical, and writing skills.	Advanced
Project Management Skills	Strong project management skills; able to balance multiple priorities.	Advanced

Intern Structure

- Term limited (10-12 weeks)

Working Environment

While performing the duties of this job, the associate is required to meet the following physical demands:

Working Condition	N/A	Yes	No
Extreme cold	X		
Extreme heat	X		
Humid	X		
Wet	X		
Noise		X	
Hazards	X		
Temperature Change		X	
Atmospheric Conditions		X	
Vibration	X		
Exposure to Blood, Body Fluids, or tissues	X		

The work environment characteristics described are representative of those an employee encounters while performing the primary duties and responsibilities of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands & Working Conditions

Job Description

Standard ADA Selection	Office Environment					
A thorough completion of this section is needed for compliance with legal standards such as the Americans with Disabilities Act. The physical requirements described are representative of those that must be met by an employee to successfully perform the essential functions of this job.						
<i>Physical Demand</i>	<i>N/A</i>	<i>Rarely</i>	<i>Occasional</i>	<i>Frequently</i>	<i>Constantly</i>	<i>Weight</i>
Stand				X		
Walk				X		
Lift				X		Up to 50lbs
Carrying				X		
Pushing				X		
Pulling				X		
Balancing				X		
Stooping				X		
Kneeling				X		
Reaching				X		
Handling				X		
Grasping				X		
Talking					X	
Hearing					X	
Repetitive Motions					X	
Eye/Hand/Foot Coordination					X	

The physical demands described are representative of those that must be met by an employee to successfully perform the primary duties and responsibilities of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Travel Requirements

<i>Est. Amount</i>	<i>Brief Description</i>
Less than 10%	Some travel to meetings, conferences, or events.

Valid Driver's License Required

No	Travel to meetings and/or events may be necessary. Picking up food and/or supplies may be necessary.
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I have received a copy of this job description and discussed it with my supervisor.

Employee Name

Employee Signature

Date

