# SHELTON GROUP
## Job Description - Director, Investor Relations

**POSITION SUMMARY:**

Prepare, design and implement the investor relations programs for clients and assist in expanding and developing the IR department including the relationships within the financial community and with potential clients. Position involves interaction with the investment community and executive management through written and verbal contacts. Overall responsibilities are related to strategic counsel and account oversight which will include: supervising the IR account management team; directing the IR programs for client companies; coordinating the execution of all details related to the IR plans as well as coordination with other departments within the company; providing management with strategic IR counsel and direction; expanding and maintaining relationships with the financial community including analysts, institutions, and other leaders or influencers within the industry, and providing other assistance as directed by the Executive Vice President or President.

**POSITION RESPONSIBILITIES:**

Management

- Manage designated, direct report employees including all HR-related issues: employee development, annual reviews, employee discipline…
- Develop IR plan strategies in conjunction with the team and EVP
- Supervise the day-to-day activities of the IR account team
- Oversee the execution of client IR plans
- Provide regular updates regarding the progress and developments of the department and the client accounts
- Provide the IR account team with professional development opportunities
- Review all written materials generated by IR account team prior to distribution to the client
- Speak with management regularly to review corporate developments, communicate the IR plan strategies and highlight Shelton IR efforts
- Continually search for new and better ways to do things at Shelton as well as for the client

Communication

- Identify and communicate regularly with sell-side analysts, institutions and shareholders on behalf of client companies as well as an attempt to develop ongoing relationships
- Pitch client company stories to the financial community with the intent to obtain stock coverage, increase institutional ownership or identify a potential investors
- Draft/edit client IR-related documents, corporate profiles and other investor-related information
- Draft/edit earnings/press releases and conference call scripts
- Draft/edit corporate financial presentations and speech outlines
- Draft/edit copy for shareholder letters
- Conduct follow-up calls with investors and analysts to solicit interest/feedback after client-attended or sponsored events
- Conduct follow-up calls with investors and analysts to solicit interest/feedback after targeted mailings

Research

- Obtain a comprehensive understanding of client companies' business, industry, products and technology
- Identify institutional investors who fit client profiles based on investment strategy, market cap preferences, investment style, etc.

- Identify analysts who fit client profiles based on industry niche, coverage universe, banking relationships, etc.
- Monitor IR & industry trends, SEC regulations, FASB guidelines, etc. in order to provide cutting-edge, strategic counsel to client companies
- Periodically review business and industry publications for news related to client companies and their competitors, Internet activities, and general business/economic trends

Logistics/Analysis

- Regularly establish key strategic messages for clients based on corporate developments, market environment or crisis situations. Properly communicate to the IR team for implementation
- Create IR plans for clients to be updated and expanded on a quarterly basis
- Prepare and communicate quarterly IR Program progress reports, as well as conduct weekly and monthly meetings with other IR team members and client
- Work closely with Shelton PR (or the client's internal marketing/PR team) to ensure consistent messaging in the client's communications
- Provide management with feedback from the investment community about the interest level of investors and analysts
- Manage the outreach and logistics for client road shows, either independently or in conjunction with the sell-side firms
- Work with investment bankers and analysts to secure invitations to key financial conferences
- Accompany and assist management at client-attended and sponsored events (minimum travel required)

Measurement

- Client satisfaction and account retention
- Strategic oversight of accounts
- Level and quality of service to clients
- Management of employees
- Interpersonal rapport with clients and fellow employees
- Teamwork – ability to work with team and clients
- Personal and professional development
- Problem-solving and decision-making skills
- Ability to manage multiple tasks and clients (time management)
- Initiative and follow-through
- Leadership
- Writing and presentation skills
- Proficiency in Word, Excel and Power Point a must

We are located at 75 and Coit and have a great benefits plan that includes medical/dental/vision, 401k plan, paid holidays and generous PTO. Although the preference is to hire a local candidate, a remote position may be considered for a more experienced candidate. For consideration, ***please send resume with salary requirements to apaddock@sheltongroup.com*** (please send in unzipped Word document). Selected candidates will be contacted -- interviews will be held immediately. Please see our website at www.sheltongroup.com for more information on Shelton Group.