



Principal, Equity-Based Plan Structuring & Implementation

New York, New York

To Apply

Please submit a resume to hire@ownershipworks.org with the subject line “Last Name, First Name – Principal – Equity-Based Plans.” Candidates are encouraged to apply as soon as possible. Due to volume, only those candidates considered for an interview will be contacted.

About Ownership Works

Founded in 2021, Ownership Works is a fast-growing nonprofit organization with a mission to increase prosperity through shared ownership at work. We help companies and investors implement innovative shared ownership programs that make every employee an owner and honor the collective effort behind a company’s success.

Employee ownership can unlock new levels of success for companies and employees, increasing workers' access to and participation in wealth creation. At scale, employee ownership can help low- and moderate-income households and people of color access the single largest source of wealth in America: Stock ownership. Through shared ownership programs that support better corporate cultures and returns, the nonprofit aims to generate at least \$20 billion of wealth for lower-income and diverse workers over the next decade.

About the Business Engagement Team

The Business Engagement team provides best-in-class advisory services to top management teams at companies and private equity firms on the design and execution of shared ownership programs. This includes helping companies to:

- structure and implement optimal equity-based plans that share ownership with all employees;
- develop a robust engagement and ownership culture; and
- improve employees’ financial capability.

Ownership Works partners with some of the nation’s largest private equity, financial services, consulting, and law firms, and is also supported by premier foundations.

We are:

- Results-oriented with a culture of humility and excellence
- Pragmatic optimists who enjoy translating “big ideas” into actionable plans and measurable results
- Strategic, curious, diverse, and accountable
- Incredibly fast moving as we build and grow the organization

About The Position

Ownership Works is seeking a driven and mission-oriented professional who is passionate about creating more valuable companies and advancing social impact through engagements with private and public companies as they implement shared ownership programs. The Principal – Equity-Based Plans will serve as a technical resource and advisor to the Ownership Works team and our clients on equity-based compensation, as well as manage client engagements and partner relationships. The successful candidate will have experience with structuring and implementing equity-based incentive plans, demonstrate a passion for value creation and social impact, and exhibit strong client-facing and project management experience.

Core Goal

Provide expertise on the tax and other legal implications of structuring equity-based incentive plans. Lead and project manage the day-to-day execution of client engagements, taking ownership of end products. Help establish Ownership Works as a thoughtful, value-add advisor to companies implementing shared ownership programs.

Responsibilities

Equity-based plan structuring

- Serve as Ownership Works' in-house subject matter expert on the tax and legal implications of structuring broad-based equity-based plans for public and private companies, including private equity owned companies. These plans should:
 - provide meaningful opportunities for hourly, clerical, entry-level, and intermediate-level colleagues to participate in financial upside without assuming risk;
 - be appropriately tailored to industry- and company-specific factors; and
 - be administratively practical.
- Innovate existing broad-based equity-based plan models to create tailored approaches for businesses of varying sizes and structures and across industries
- Collaborate with Ownership Works' strategic partners, including top-tier law firms and accounting firms
- Build a network of professional services providers to support companies with tax, accounting, legal and administrative aspects of broad-based equity-based plans, including share plan administration
- Develop primers and educational materials for internal and external facing knowledge centers
- Contribute to organizational development to achieve ambitious mission and growth targets

Client engagement

- Assist private and public companies with structuring broad-based equity-based plans
- Collaborate with a consortium of private equity firms to design and structure broad-based equity-based plans within their portfolio companies
- Establish trust-based relationships with clients and partners
- Manage and prioritize across multiple client engagements

- Manage analysts/associates who will lead processes to gather and analyze information, formulate customized solutions, and develop and present results/recommendations in collaboration with client team members
- Refine existing content and develop new client-facing content for specific topics and practice areas
- Develop breadth of knowledge across the four key verticals of shared ownership programs: (1) Structuring & Implementing Equity-based Plans; (2) Creating a Culture of High Engagement, Voice & Ownership; (3) Financial Inclusion & Resiliency; and (4) Data & Learning

What this position at Ownership Works offers you

- A unique opportunity to work with top leaders in finance and business to impact the lives of thousands of hard-working individuals by transforming businesses and creating shared wealth
- Opportunity to be a specialist while gaining a comprehensive understanding of all elements of shared ownership programs
- Talented and passionate colleagues
- A flexible work environment in a people-centered organization

Skills & Qualifications

- A commitment to and passion for Ownership Works' mission
- A JD degree is required
- 10 years of job experience with at least 3 years of experience in structuring and implementing equity-based incentive plans
- Strong command of tax laws related to equity-based compensation
- Proven project management, time management, prioritization, and multi-tasking abilities while maintaining excellent attention to detail
- Ability to independently lead a client engagement from beginning to end
- Exceptional written and verbal communication skills
- Highly organized and process-oriented
- Excellent relationship management skills
- Highly responsive and collaborative team player
- Self-starter with an entrepreneurial mindset

Equal Opportunity Employer

Ownership Works is an Equal Opportunity Employer. Women, people of color, people with disabilities, LGBTQIA persons, and veterans are encouraged to apply.

Salary & Benefits

Competitive compensation package commensurate with professional services sector experience. Benefits include excellent health, vision, and dental care benefits for you and your family. Unlimited paid time off. 401(k) retirement plan with generous employer contributions.

Location

Ownership Works is building a New York City based team. We will have an office-centric hybrid work model that prioritizes the health and safety of our staff and partners.

The role may include some travel to client sites.