



Job Title: Associate Private Client Advisor (“APCA”)
Supervisor: Director of Client Services
Supervises: N/A
Position Type: Exempt
Location: Fairfield CT, Lake Success NY or Atlanta GA areas preferred – This role may be eligible for a largely remote or “hybrid” combined in office/work from home arrangement based on candidate’s location.
Date: 04/06/2021

Foundation Source is the nation’s largest provider of management solutions for private foundations, bringing unparalleled knowledge and expertise to clients across the country. The company’s administrative support services, expert guidance, and technology-based foundation management tools provide a complete outsourced solution for private foundations. The result: better-run, more effective foundations, and more enjoyable philanthropy. Our clients supply the vision; we take care of everything else.

Overview/Job Description:

The **Associate Private Client Advisor (“APCA”)** provides a high level of administrative support and task management for a team of Private Client Advisors (“PCA”s) and their portfolio of foundation clients. PCAs are the relationship managers and primary contact for each private foundation, including their board members, staff, financial advisors, and other trusted counselors. The APCA serves as a secondary contact for these relationships and works collaboratively with the PCAs to help clients carry out their philanthropic goals and activities by engaging and facilitating Foundation Source’s full suite of resources.

Key Responsibilities/Duties:

The APCA is responsible for managing a variety of operational and administrative tasks and for providing impeccable service and support to clients and their advisors. The APCA will work closely with the PCA and other internal departments to provide clients with a coordinated and cohesive service offering to assure a superior experience with Foundation Source. Responsibilities include the following tasks, done in collaboration with or as delegated by the supervising Director or PCA:

- Respond to client inquires in a timely and professional manner
- Coordinate with other departments to ensure smooth operational processes
- Oversee tasks related to the tax preparation process and coordinate related client communications
- Monitor clients’ annual distribution obligations
- Assist with maintaining updated client profiles, including running reports for annual reviews
- Participate in client calls/meetings as an integral member of the Client Services team when deemed appropriate
- Maintain accurate and professional client records so that key issues and interactions are easily reviewed and understood.
- Attend/complete training initiatives to ensure continual learning and understanding of PF compliance and FS process/procedures
- Maintain working knowledge of all FS systems, processes and products
- Participate in additional projects as requested by PCAs and/or management

Requirements:

Skills and Personality

- Clear and effective communication skills, both written and verbal
- Strong client-service orientation
- A strong and proven ability to organize and efficiently handle a high volume of work, prioritize issues and tasks
- Detail oriented, with high attention to accuracy and quality
- Ability to maintain professional and positive demeanor with both clients and colleagues, even under pressure
- Proficiency in MS Office and ability to learn and utilize new technology such as Foundation Source's proprietary systems
- Ability to work independently and cooperatively in a team environment
- Highest level of integrity, including respect for and adherence to client and corporate confidentiality.

Educational and Past Experience

- Demonstrated track record of successful employment in a professional office environment
- Bachelor's Degree or equivalent job experience
- An ideal candidate will have 1-2 years' experience delivering administrative support and exceptional customer service at a private foundation, financial services firm, or family office or will demonstrate similar relevant experience.

How to Apply:

- Please send your resume, including cover letter, to careers@foundationsource.com. Applications without cover letters will not be considered.

PHYSICAL DEMANDS AND WORK ENVIRONMENT

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the functions. While performing the duties of this position, the employee is regularly required to talk or hear. The employee frequently is required to use hands or fingers, handle or feel objects, tools, or controls. The employee is occasionally required to stand; walk; sit; and reach with hands and arms. The employee must occasionally lift and/or move up to 15 pounds. Specific vision abilities required by this position include close vision, distance vision, and the ability to adjust focus. The noise level in the work environment is usually low to moderate.

NOTE:

This job description in no way states or implies that these are the only duties to be performed by the employee(s) incumbent in this position. Employees will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments. All duties and responsibilities are essential functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. To perform this job successfully, the incumbents will possess the skills, aptitudes, and abilities to perform each duty proficiently. Some requirements may exclude individuals who pose a direct threat or significant risk to the health or safety of themselves or others. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities. This document does not create an employment contract, implied or otherwise, other than an "at will" relationship.

The company is an Equal Opportunity Employer, drug free workplace, and complies with ADA regulations as applicable.