



Job Title: Director of Client Services
Supervisor: COO (Interim)
Supervises: Private Client Advisor(s)
Position Type: Exempt
Location: Fairfield, CT – The person in this role will work remotely from home until our CT office fully re-opens post COVID concerns/protocols
Date: 10-4-21

How to Apply

Please send your resume directly to Estee Shor (eshor@foundationsource.com).

Application Deadline

October 8, 2021

Overview/Job Description

Directors also have additional management and leadership responsibilities in overseeing one or more least one Private Client Advisor.

Responsibilities/Duties

- Train, mentor, encourage and inspire direct report(s), helping them fulfill their highest potential.
- Maintain working knowledge of all FS systems, processes and products and proactively review accounts to identify opportunities to be of service to clients, deepen their philanthropic knowledge, and build client loyalty to the company.
- Implement new clients, coordinating among internal Tax and Legal, Philanthropic Advisory, Account Implementation, Financial and IT specialists, as well as the clients' financial institutions and trusted advisors.
- Advise in the customization, development, execution, and maintenance of Foundation Source Online (FSOL) including FS Requests and FS Results to facilitate online grant application and reporting processes as well as online screen views, digital letterhead, and correspondence templates.
- Advise and assist clients with grants including advanced grant making such as funding through fiscal sponsors; intermediaries; to supporting organizations; to individuals; and using expenditure responsibility or equivalency determination.
- Participate in meetings with prospects, clients, advisors, and staff and have equal success and comfort establishing rapport and strong relationships over the phone and through written correspondence.
- Administrative and operational responsibilities related to financial transactions and supporting documentation; gathering client data and financial information; developing and

- preparing materials for Board and Trustee meetings; managing grant proposal, funding, and reporting cycles; developing and preparing reports for both internal and client use.
- Continually expand knowledge of compliance, governance, general philanthropic issues, and other concerns affecting private foundations and accurately articulate this information to clients as needed and appropriate.
 - Participate in occasional sales activities, such as prospect meetings and phone calls including FSOL demos.

Experience, Education, & Skills

- Strong leadership abilities. The successful candidate will be genuine; possess and demonstrate readily available senses of humility and humor; demonstrate a strong work ethic as well as a sense of urgency in resolving client issues; be an efficient and creative problem solver; demonstrate a positive outlook and desire to get to “yes” when hurdles are presented; have a professional and confident yet respectful demeanor; and be a fully participating team member who is willing to go beyond the scope of a job description as is occasionally required for the good of clients, colleagues and the company.
- Superior written and verbal communication skills appropriate for working with ultra-high net-worth individuals and corporate and foundation executives, and their advisors and staff.
- Demonstrable success in managing complex client relationships and in navigating complicated dynamics.
- A strong and proven ability to organize and handle a high volume of work, prioritize issues and tasks, and track multiple accounts at various stages of implementation and service balanced with flexibility to handle unexpected changes in priorities.
- Strong analytical skills to review and get to the heart of client issues quickly and determine efficient resolutions. Must be able to solve problems independently and present oneself as an authority capable of resolving issues and providing solutions.
- Demonstrated success in relaying difficult messages to clients and in resolving related issues to the satisfaction of all stakeholders.
- Technologically savvy, including current experience using Outlook, Word, Excel, and PowerPoint, as well as the ability to conduct Internet research and to utilize and train others on new technology including Foundation Source’s proprietary technological tools.
- Respect for and adherence to client and corporate confidentiality.

- Required:
 - Demonstrable understanding and knowledge of private foundation compliance and concepts, such as annual distribution requirements; excise taxes; international granting; IRS guidelines regarding grant making and expenses; governance.
 - Demonstrable experience interacting with ultra-high-net-worth individuals and their staff and advisors.
 - Bachelor’s Degree or equivalent job experience.
- Strongly preferred:
 - 3 - 5 years direct professional experience with private foundations
 - Experience with using Foundation Source Online.

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.