

Job Title: Client Operations Specialist
Supervisor: Manager of Client Operations
Position Type: Full Time, Non-Exempt
Location: Fairfield, CT
Date: 9/2/2021

About Foundation Source

Foundation Source is the nation's largest provider of management solutions for private foundations. We empower people and companies to create a better world with their philanthropy through a configurable suite of administrative, compliance, and advisory services complemented by purpose-built foundation management technology and private foundation experts.

We work in concert with financial advisors, legal and accounting professionals, consultants, and family offices, as well as directly with individuals, families, and corporations to bring philanthropic visions to life. As we celebrate our 20th year of service, Foundation Source supports nearly 2,000 family, corporate, and professionally staffed foundations of all sizes and has enabled more than \$7 billion in charitable grants.

Position Description

The Client Operations Specialist will provide administrative support to our client relationship managers (Private Client Advisors). The Specialist will be responsible for both daily and recurring administrative tasks that are both internal and client-facing, as well as one-time and cyclical projects on assignment. While this position is operationally and internally focused, the Specialist will regularly interact with high-net worth clients via email and phone.

Essential Duties and Responsibilities

- Working with proprietary software and confidential client information to run reports and updatedata
- Entering, formatting, editing, and publishing grant letters
- Reviewing, organizing, and processing client expenses
- Preparing FedEx and USPS mailings/shipments
- Assisting with special projects as needed
- Working with our Tax and Legal specialists to keep clients grants and expenses compliant with IRS regulations

Essential Skills & Character Qualifications

- Clear and effective communication, both written and verbal
- Respect for and adherence to client confidentiality
- Computer savvy, including competency with the Microsoft Office application suite (especially Outlook, Excel, and Word)
- Enthusiasm for administrative work
- Strong organizational skills, attention to detail, commitment to accuracy and excellent work product, employed with maximum efficiency, without being weighed down by minutia
- Accountability and initiative with regards to executing tasks and coordinating with colleagues
- Proven ability to handle a high volume of work, prioritize issues and tasks, and to display "grace under pressure" and equanimity
- An action-oriented approach to work and desire to take on more, as necessary
- A constructive, can-do attitude, with a focus on achieving positive, successful

outcomes, especially in challenging circumstances

- Receptiveness to feedback and critique, demonstrating maturity and self-awareness through a consistent willingness to listen, learn, and ask questions
- Strong client-service orientation and interpersonal skills, including a sense of diplomacy and a desire to be a key contributor to a smoothly running team and department
- A professional presence and demeanor in working with both internal and external constituents

Educational and Past Experience

- Associate degree minimum required
- Bachelor's Degree preferred
- An ideal candidate will have at least 1-2 years of successful employment in a professional office environment
- General knowledge of administrative tasks/issues pertaining to private foundations a plus.

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.