



Job Title: ACH and Wire Specialist
Supervisor: Director of Client Operations
Position Type: Full-time, Salaried, Non-Exempt
Location: Fairfield, Connecticut
Date: 3/9/2022

What We Do

Foundation Source helps people and companies make a difference in the world with their private foundation giving

Overview of Position:

- Manages and refines the end-to-end ach/wire processes, with attention to the client-facing as well the internal back-office procedures.
- Works with product and engineering teams, as well as IT Operations, to develop enhancement requirements to streamline forms, emails, and other components of ach/wire.
- Works with key stakeholders/managers in other departments to ensure a smooth wire process for client and company.

Experience, Education, & Skills

- 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 executing wires; 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.
- Technologically savvy, including current experience using Outlook, Word, Excel, and PowerPoint, and utilize and train others on new technology including Foundation Source’s proprietary technological tools (FSAdmin, FSOL, PCA Portal, Salesforce).
- A strong and proven ability to organize and handle a high volume of work, prioritize and track issues and multiple tasks, with flexibility to handle unexpected changes in priorities.

Required

- Demonstrable understanding and knowledge of private foundation compliance and IRS guidelines regarding grant making and expenses, including such concepts as: investment vs. charitable expenses, self-dealing, taxable expenditure rules (earmarking), annual distribution requirements; general knowledge of excise taxes; international granting; grants to individuals and scholarships.
- Demonstrable experience interacting with ultra-high-net-worth individuals and their staff and advisors.
- Bachelor's Degree or equivalent job experience.

Strongly preferred:

- 3+ years direct professional experience with private foundations
- Experience with using FSOL, PCAP, and FSADMIN.

How to Apply:

Please send your resume directly to Estee Shor (eshor@foundationsource.com) and Cate Townsend (ctownsend@foundationsource.com).

About Foundation Source:

Foundation Source is America's leading provider of support services for private foundations—from set-up and administration to high-level philanthropic advisory services. The Company's full suite of back-office, online, and advisory services helps its foundation clients ease the administrative burden, engage board and family members, and deliver greater social impact. Foundation Source's client base of foundations created and operated by high-net-worth and ultra-high-net-worth individuals and families has grown significantly over the years due to its innovative product offering and strong focus on philanthropy within the market. Today, Foundation Source serves over 1,600 private foundations nationally representing almost \$15 billion in assets under administration. The Company is headquartered in Fairfield, CT.

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.