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Title:	*Private Client Advisor, Premier Services Team*	**Date:**	*8/2/2022*
Reports to:	*Director of Client Services*	**FLSA Classification:**	
Department:	*Client Services*	**Location:**	*Fairfield, CT / remote*
Supervisory:	*n/a*	**Position ID Number:**	
Position Type:	*Exempt*		

Job Summary:
Private Client Advisors on the Premier Services Team are the relationship managers for as many as 20 private foundations and their board members, staff, financial advisors, and other trusted counselors, helping them to carry out their philanthropic goals and administrative activities by engaging and facilitating Foundation Source's full suite of comprehensive resources.

The *Private Client Advisor (PCA), Premier Services Team*, reporting to a Director of Client Services, provides support to both the Director's portfolio of clients and, eventually, their own defined group of clients

Duties & Responsibilities:
PCAs for the Premier Services Team work directly with a director and other seasoned client advisors to support and guide private foundation clients in conducting their philanthropic and administrative activities to assure a superior experience with Foundation Source. The PCA will establish and maintain personal contact with a dedicated base of clients by responding to requests for information, anticipating and customizing services to meet client needs, and providing impeccable service and support to clients and their trusted advisors. This includes the following tasks, done in collaboration with or as delegated by the supervisor or other senior staff:

- Respond to client phone calls and emails with speed and accuracy ensuring quick resolution to client, marshalling appropriate resources from other departments when necessary.
- 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 onto FS technology platform and back-office services, coordinating among internal account implementation, financial and IT specialists, as well as the client's financial institutions and advisors.
- Assist in the development, execution, and maintenance of FS Requests (online applications) and FS Results (online reports) to facilitate online grant application and reporting processes.
- Provide a basic level of technology support, including assisting clients in becoming familiar and comfortable with Foundation Source Online (FSOL).
- Help customize FSOL tools and resources for individual client use (page views, digital letterhead, email and letter templates, proposal, and report forms, etc.).
- Provide feedback to the technology team on common problems and/or opportunities for product improvement and enhancement.
- Administrative and operational responsibilities such as:
    - Reviewing and facilitating payment of invoices, expense reports and reimbursements, ensuring accuracy and compliance with IRS rules and private foundation best practices.
    - Reviewing and processing grant letters for same.

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  - Gathering financial information from advisors, financial institutions, and clients as needed to ensure accurate account reconciliation, estimated excise tax calculations, and annual state and federal return filings.
  - Preparing and compiling materials for Trustee and Board of Directors' meetings.
  - Generating reports both for client and internal use and reference, using proprietary software platforms and MS Office products; including facility in preparing and analyzing financial spreadsheets, e.g., cash flow projections.
  - Facilitating basic communication among client foundations and their applicants and grantees using FS Requests and Results technology, email blasts, and phone calls as necessary and appropriate.
- Assist clients with advanced grantmaking such as to fiscal sponsors; through intermediaries; to supporting organizations; and using expenditure responsibility or equivalency determination.
- Maintain accurate and professional client records so that key issues and interactions are easily reviewed and understood.
- Continually expand knowledge of compliance, governance, general philanthropic issues, and other concerns affecting private foundations and articulate this information to clients as needed and appropriate.
- Meet or exceed department performance indicators relating to retention, referrals, and revenues.
- Occasional travel to attend trainings or meetings with clients may be possible (when it can be done safely, post-pandemic period).

Required Skills & Abilities:

- Clear and effective communication skills, written and verbal, appropriate for working with ultra-high net-worth individuals, corporate and foundation executives, and their advisors and staff are required.
- Strong client-service orientation and interpersonal skills: a "can-do" attitude and strong sense of diplomacy are critical for this role.
- Highest level of integrity, including respect for and adherence to client and corporate confidentiality.
- A strong and proven ability to organize and efficiently handle a high volume of work, prioritize issues and tasks, and track multiple accounts at various stages of implementation and service balanced with flexibility and adaptability to handle unexpected changes in priorities.
- Strong, yet balanced, attention to accuracy without getting weighed down with minutia.
- Strong analytical skills to review and get to the heart of client issues quickly and determine efficient resolutions. Solutions oriented and ability to present oneself as an authority capable of resolving issues and providing solutions.
- Computer savvy, including current experience using Outlook, Word, Excel, PowerPoint, and Salesforce as well as the ability to conduct Internet research, and to learn and utilize new technology such as Foundation Source's proprietary systems.
- Ability to display grace under pressure and positivity in a high-volume, high-energy environment both with clients and colleagues.
- An action-oriented approach to work and the curiosity and desire to take on more.
- Ability to work independently while continuing to grow and gain expertise from senior staff.

Education & Experience:

- Demonstrated track record of successful employment in a professional office environment required.

- Bachelor’s Degree or equivalent job experience required.
- An ideal candidate will have 1-2 years’ experience delivering relationship and administrative support and exceptional customer service at a private foundation, financial services firm, or family office or will demonstrate similar relevant experience.
- General knowledge of compliance and administrative issues pertaining to private foundations a plus.

Physical Requirements:

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.

Signatures - This job description has been approved by:

Employee: _______________________________ Date: ________________

Hiring Manager: __________________________ Date: ________________

HR Manager: _____________________________ Date: ________________

An Equal Opportunity Employer

We do not discriminate based on race, color, religion, national origin, sex, age, disability, genetic information, or any other status protected by law or regulation. It is our intention that all qualified applicants are given equal opportunity and that selection decisions be based on job-related factors.