Foundation Source

Job Title: **Associate Private Client Advisor**
Position Type: **Full Time - Exempt**
Location: **Fairfield, CT**
Date: **07/15/16**

Please email cover letter and resume to: careers@foundationsource.com

Overview/Job Description

Private Client Advisors (PCAs) are the relationship managers for 50-80 private foundations and their board members, staff, financial advisors, and other trusted counselors. The **Associate Private Client Advisor (APCA)** provides support to both a team of PCAs and an initial group of private foundation clients, assisting in guiding clients through all aspects of Foundation Source services. The APCA is responsible for assisting with the retention of the company's clients by responding to client questions and requests and for engaging the full resources of the company in delivering superior customer service to our private foundation clients.

An ideal candidate would have spent time providing high-level administrative and exceptional customer service support at a family foundation, financial services firm, or other similar experience.

Responsibilities/Duties:

Support clients and a team of PCAs in the following areas:

- Establish and maintain personal contact with a dedicated base of clients: responding to requests for information, anticipating and customizing services to meet client needs, overseeing and executing day-to-day administrative tasks and providing superior service and support to clients and their trusted advisors.
- Respond to client phone calls and emails with speed and accuracy and provide quick resolution to client inquiries, marshalling appropriate resources from other departments when necessary;
- Implement new clients onto the Foundation Source platform, coordinating with internal implementation specialists as well as the client's financial institutions and trusted advisors.
- Provide a basic level of technology support, assisting clients in becoming familiar and comfortable with their Foundation Source Online interface.
- Proactively review accounts to identify opportunities to be of service to clients; deepen their philanthropic knowledge and build their loyalty to the company.
- Provide philanthropic support and advice, as appropriate.
- Maintain client records in an accurate, professional manner so that others can review and understand key client issues and interactions.
- Maintain working knowledge of all Foundation Source systems, processes and products.
- Continually expand knowledge of compliance, governance and other issues affecting private foundations and effectively articulate this information to clients.

- Provide feedback to the technology team on common problems and/or opportunities for product improvement and enhancement.
- Meet or exceed department performance indicators relating to retention, referrals and revenues.

Required skills and qualifications:

- Strong client-service orientation and interpersonal skills: a "can-do" attitude and strong sense of diplomacy are absolutely critical.
- Highest level of administrative and organizational skills is essential.
- Comfort communicating with high-net-worth individuals and their advisors.
- Ability to solve problems independently and present yourself as an authority capable of resolving issues and providing solutions.
- Comfort in a high-volume, high-energy environment.
- Strong ability to communicate clearly and effectively in both written and verbal formats.
- A strong and proven ability to multi-task and prioritize issues, tracking multiple accounts at various stages of implementation and service.
- Strong attention to detail, organizational and prioritizing skills.
- Strong analytical skills to review client issues and get to the heart of the issue quickly and determine most efficient way to resolve the issue.
- Computer savvy, including knowledge of Word, Excel, and PowerPoint and ability to utilize customer relationship tools, including salesforce.com.
- Ability to work independently while continuing to grow and gain expertise from senior staff.
- 1-2 years experience in a nonprofit or financial services setting, or working with high-net-worth individuals a plus.
- General knowledge of compliance and administrative issues pertaining to private foundations also a plus.

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