



**Job Title:** Legal Associate  
**Department:** Tax and Legal Affairs  
**Supervisor:** Chief Administrative Officer  
**Supervises:** N/A  
**Position Type:** Salaried-Exempt  
**Location:** Lake Success, NY  
**Date Posted:** Sept. 2020

**Overview/Job Description:**

Serve as part of a team of legal experts to provide the core services every foundation needs in order to run compliantly.

**Essential Functions:**

- Help navigate daily compliance questions in subjects such as: Compensation; Contributions; Corporate Foundation Issues; Direct Charitable Activities; Asset Transfers; Fundraising; Governance; Investments; Program Related Investments; and Real Estate.
- Review grants and expenses to ensure compliance with IRS Regulations and help prevent self-dealing, jeopardizing investments, taxable expenditures, and excess business holdings, etc.
- Facilitate advanced grantmaking by drafting applications to obtain advance IRS approval of programs to make grants to individuals; or for scholarship, fellowship, and awards programs.
- Customize grant agreements and review grant language to prevent inadvertent self-dealing or earmarking.
- Prepare the 1023 Application to obtain federal tax-exempt status for foundations.
- Draft custom resolutions to suit each foundation's planned transitions in governance.
- Facilitate a compensation benchmarking analysis for foundations seeking to compensate insiders.

**Required education:**

Juris Doctor (J.D.); completion of bachelor's degree followed by law school

**Physical Demands and Work Environment:**

- In order to perform successfully the essential functions of this position, an employee must generally be able to do the following: communicate verbally (speak and hear); use hands or fingers; handle or feel objects, tools, or controls; stand; walk; sit; reach with hands and arms; occasionally lift and/or move up to 15 pounds; and write coherently and grammatically in English. The position requires the ability to see objects, print, and/or images at close range and in the distance, and the ability to adjust focus. The noise level in the work environment is usually low to moderate. Foundation Source will provide reasonable accommodations to enable otherwise qualified individuals with disabilities to perform the essential functions of the position.

**NOTE:**

- This job description does not include all of the duties that may be required of an employee in this position. Other functions, tasks, and duties may be assigned by the Company, in its discretion. To perform this job successfully, an employee must possess the skills, aptitudes, and abilities to perform each duty proficiently. Educational and experience requirements listed in this document are the minimal requirements for consideration for the position. The set of functions considered "essential" is subject to modification by the Company. Foundation Source will provide reasonable accommodations to enable otherwise qualified individuals with disabilities to perform the essential functions of this position. This job description does not create an express or implied employment agreement; in the absence of a specific written agreement to the contrary, all Foundation Source employees are employed "at will," and may resign or be discharged at any time, with or without notice.

Foundation Source is an Equal Opportunity Employer, maintains a drug free workplace, and complies with the ADA.

All applicants are considered without regard to race, color, religion, sex, gender identity, sexual orientation, pregnancy, age, national origin, ancestry, physical/mental disability, military/veteran status, genetic information, marital status, or any other protected characteristic under applicable federal, state, and local laws. By completing this application, you are seeking to join a team of hardworking professionals dedicated to consistently delivering outstanding service to our customers and contributing to the financial success of the organization, its clients, and its employees. Any applicant requiring a reasonable accommodation to complete the application and/or participate in the interview process should contact a management representative.