



Job Title: Private Client Advisor, Pacific Region (PCA)
Department: Client Services
Supervisor: Senior Director of Client Services
Position Type: Full Time, Salaried, Exempt
Location: Remote/In-Office (must reside in Southern California)
Date: October 2020

Overview/Job Description:

Private Client Advisors (PCAs) on the regional Client Services teams are the relationship managers for 50-100 private foundations in a designated region of the United States and their board members, staff, financial advisors, and other trusted counselors. PCAs help clients to carry out their philanthropic goals and activities by engaging and facilitating Foundation Source's full suite of resources.

Newly hired **Private Client Advisors** provide support to a designated group of such clients as well as collaborate with more seasoned PCAs to support their clients.

The current open position is specific to the Pacific Region. The ideal candidate must reside in Southern California. The position will start as 100% remote with the potential to shift to a partial in-office schedule, post-pandemic. Computer equipment and necessary supplies will be provided. The candidate must have their own remote work-space that allows for the quiet needed to conduct calls/video meetings etc. with clients in a professional manner. Foundation Source is headquartered in Fairfield, Connecticut so travel to the East Coast will be required on occasion.

Responsibilities/Duties:

The PCA will both support his or her own select group of clients and will also work directly with a team of more seasoned PCAs to support and guide their private foundation clients in conducting their philanthropic 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 advisors. This includes the following tasks, done in collaboration with or as delegated by the supervising Director or PCA:

- 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 the Foundation Source technology platform and back office services, coordinating with internal implementation, financial and IT specialists as well as the client's financial institutions and advisors.
- Provide a basic level of technology support, assisting clients in becoming familiar and comfortable with Foundation Source Online.
- Provide philanthropic support and advice, as 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.
- 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 feedback to the technology team on common problems and/or opportunities for product improvement and enhancement.
- Continually expand knowledge of compliance, governance, general philanthropy issues and other concerns affecting private foundations and effectively 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.

Skills and Personality

- 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 is absolutely critical.
- 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 one’s self 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.

Educational and Past 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.

How to Apply:

- Please send your resume, including cover letter, to acorrea@foundationsource.com
Applications without cover letters will not be considered.

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. 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.