Job Title:	**Private Client Advisor, Regional (PCA)**
Supervisor:	Director of Client Services
Supervises:	**N/A**
Position Type:	**Exempt**
Location:	**Fairfield, CT**
Date:	08/31/18

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

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.

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.

Requirements:

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 are 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.