Job Title: **Associate Private Client Advisor, Premier Group (APCA)**
Supervisor: **Deputy National Director of Client Services/Manager of Client Services Operations**
Supervises: **N/A**
Position Type: **Exempt**
Location: **Fairfield, CT**
Date: **Sept. 4, 2019**

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) for the Premier Group 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 activities by engaging and facilitating Foundation Source's full suite of resources.

The **Associate Private Client Advisor, Premier Group (APCA)** provides secondary support to a defined group of such clients, with a specialized focus on processing credit card expenses and providing compliance-related guidance to clients pertaining to their credit-card usage.

Responsibilities/Duties:
The APCA for the Premier Group works directly with the Directors of Client Services and seasoned PCAs serving Premier-tier clients with processing credit card expenses, resolving compliance-related inquiries with the Foundation Source Tax & Legal department, and providing guidance and education to clients about compliant credit card usage. This will require the APCA to establish and maintain ongoing contact with Premier-tier clients as their main point of contact within Foundation Source focusing on needs, challenges, and questions pertaining to credit card usage by private foundations. This includes the following tasks, done with the supervision of Premier Directors & PCAs:

- Maintaining a tier-wide listing and schedule of credit cards in use by Premier clients, including their respective due dates, respective credit card holders/users for each foundation, and log-in information for online access to credit card statements when provided by clients.

- Processing expense checks to pay balances due to credit card companies, which will include accurately breaking out and categorizing credit card charges to ensure such charges are accurately reflected on the client's yearly tax return (990-PF). The selection of categories and application of any other relevant "report codes" will be determined in consultation with both the client and the Foundation Source Team of tax accountants.

- Reviewing credit card charges for any compliance issues, and appropriately evaluating possible issues with the expertise of the Foundation Source team of attorneys. In conjunction with this, the APCA will be responsible for communicating with clients about these issues to either solicit additional context about problematic charges or to seek resolution of any confirmed issues. Opportunities will be sought to better educate clients about both common and uncommon compliance pitfalls possible with credit card usage so they can be successfully avoided or rectified.

- Monitoring the shipment of credit card payments to their respective payees to guarantee timely payment; this will include consulting with Directors, PCAs, and clients as necessary about when it may be advisable or necessary to expedite such payments.

- Serving as an available source of expertise and advisement for clients expressing interest in starting to use a credit card for their private foundation, and providing training to clients seeking to submit credit card expenses themselves through their Foundation Source Online (FSOL) portal.

- Working closely with the Foundation Source Tax & Legal team to standardize best practice both internally and with clients as to how credit card expenses are processed.

- Working closely with the Foundation Source IT team to better enhance both the "front-end" and "back-end" of the FS expense module to streamline how credit card expenses are captured in our systems.

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.

PHYSICAL DEMANDS AND WORK ENVIRONMENT

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.

NOTE:
This job description in no way states or implies that these are the only duties to be performed by the employee(s) incumbent in this position. Employees will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments. All duties and responsibilities are essential functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. To perform this job successfully, the incumbents will possess the skills, aptitudes, and abilities to perform each duty proficiently. Some requirements may exclude individuals who pose a direct threat or significant risk to the health or safety of themselves or others. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities. This document does not create an employment contract, implied or otherwise, other than an "at will" relationship. The company is an Equal Opportunity Employer, drug free workplace, and complies with ADA regulations as applicable.