

Presbyterian FOUNDATION



Job Opportunity Posting

Posting Date:	9/16/2021
Post Expires:	10/7/2021
Title:	AVP Financial & Investment Planning Professional
Grade:	22– Exempt
Department:	Trust
Posting Number:	HR 21-09-1
Preferred Location:	Mountain or Pacific time zone with ready access to major airport (e.g. San Francisco, Denver, Salt Lake City, Phoenix, Seattle, Portland)

Position Summary

This client-facing position has the primary responsibility of maintaining consistent and on-going contact with existing clients of New Covenant Trust Company, N.A. which are primarily Presbyterian constituencies and specified targets of the general public.

Scope & Breadth of Position

This position reports directly to the VP Business Development and Financial Advisor of New Covenant Trust Company.

Accountabilities

1. Assist in the development and execution of strategic plans to 1) primarily support the client retention and communication efforts of NCTC through on-going client communications such as face to face visits, phone calls, conference calls, video conference calls, and electronic correspondence and 2) secondarily to support any appropriate business development opportunities arising from on-going efforts to support existing NCTC clients.
2. In cooperation with Foundation leadership and Ministry Relationship Officers, seek opportunities for additional Foundation and NCTC solutions and services.
3. Provide regular reports updating NCTC leadership on the status of client relationships, communications, and client contact efforts.
4. Work closely with Trust Officers, Investment Officers, Ministry Relations Officers, and Operations personnel to ensure that accounts are managed under the terms and conditions specified by clients and in compliance with policy and regulations.
5. Keep abreast of current developments and trends in the capital markets, trust, charitable giving, and investment product marketplace.
6. Attend training and professional programs necessary to maintain abilities and any previously earned accreditations.

Major Duties and Responsibilities

1. Prepare quarterly and annual plans related to client contacts and regularly report progress.
2. Consult with existing clients to facilitate new NCTC and Foundation opportunities.
3. Accountable for working with the NCTC Team in preparing information required to appropriately manage existing accounts and provide reports to existing Clients.
4. Participate with Business Development Team and Trust Administration team members in appropriate introductions to new Clients of NCTC for future communications.
5. Participates in scheduling meetings with current NCTC clients on an on-going and consistent basis.
6. Works together with trust officers, investment officers, legal counsel, and the NCTC operations area in all facets of gift, trust and investment administration.
7. Work closely with existing clients, Presbyterian constituency, and other interested prospects employing a servant style work ethic to fulfill the reasonable needs of the client and to support and enhance the overall relationship.

Experience and Job-Related Requirements

- College degree required with a preference for degrees in economics and finance as well as experience in communications and client interactions. Advanced degrees and professional designations such as the CFP® or CIMA® are preferred.
- At least 3-5 years of experience and thorough knowledge in the areas of financial planning as well as trust and investment management business development, communications, and Client service.
- Position requires professional interpersonal skills inclusive of excellent oral and written communication.

Physical Requirements

- Ability to verbally communicate with management, co-workers, and Clients both individually and in a group/team setting. Regular use of the telephone and e-mail for communication is essential.
- Sitting for extended periods is common.
- Hearing and vision within normal ranges is essential for normal conversations, to receive ordinary information and to prepare or inspect documents.
- No heavy lifting is expected. Exertion of up to 10 lbs. of force occasionally may be required.
- Good manual dexterity for the use of common office equipment such as computer terminals, calculator, telephone, and copiers.
- The ability to travel up to 60% of the year is required. Regular transport of suitcase and laptop will be required.
- Good reasoning ability is required to solve a wide range of business problems.
- Able to apply statistical and mathematical calculations required.
- Ability to understand and utilize financial reports and legal documents to conduct business required.

Work Environment

- The job is performed from a remote / home office setting.
- Activities include extended periods of sitting and extensive work at a computer monitor and/or telephone.
- Frequent travel and video/conference call meetings

Forward resume to Lisa Pesavento
lisa.pesavento@presbyterianfoundation.org
Attn: HR Posting #21-09-1

“The Presbyterian Foundation is an Equal Opportunity Employer”