CLIENT SERVICE SPECIALIST-PLANNED GIFT SERVICES

CLIENT SERVICE

Assist the client, Director of Planned Gift Services, and Investment Counselor in the fulfillment of client needs.

GENERAL DUTIES

As a Member of the Planned Gift Services Team:

- Provide accounting and administrative support for Director of Planned Gift Services and Planned Gift Services Clients
- Communicate effectively with clients and custodians

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RESPONSIBILITIES

- Respond to clients requests in a timely and professional manner
- Coordinate custodian setup and payment of all planned gift distributions to ensure proper and timely distributions
- Maintain database of all planned gift beneficiary demographic information
- Use Crescendo planned gift software to prepare and provide clients with income tax descriptions as requested for charitable gift annuity contracts and charitable remainder trusts
- Facilitate creation and maintenance of all required documentation between clients and custodian
- Maintain and reconcile detailed distribution records to custodian records
- Review coding for all custodian transactions to support internal reporting systems
- Provide monthly distribution reports and advices to clients as directed
- Prepare and distribute quarterly Planned Gift reports
- Assist in preparation and filing of tax reporting including: Forms 1099R, federal and state charitable trust tax returns, and state charitable gift annuity reports.

COMPETENCIES

The skills, abilities, and knowledge that enable Clifford Swan's organizational success:

- Knowledge of charitable planned giving instruments including charitable gift annuities and charitable remainder trusts
- Proficiency in Microsoft Office suite including Excel and Word
- Attention to detail and accuracy
- Multi-task and problem solving ability
- Strong communication skills
- Ability to work collaboratively and as part of a team

GENERAL ADMINISTRATION

- Maintain orderly client files, purging old reports and unnecessary working papers. Maintain a neat work area, filing paperwork in a timely manner
- Other duties as assigned.

QUALIFICATIONS

- College graduate
- 3-5 years work experience in client service (Experience in financial services industry, trust administration or institutional planned gift development operations a plus)
- Proficiency in Microsoft Excel (Experience with Microsoft Access a plus)
- Must be eligible to work in the United States without sponsorship or restriction

APPLICATION INSTRUCTIONS

Please send resume and cover letter to info@cliffordswan.com.