

**Job Title:** Client Advisor  
**Reports to:** Managing Director, Strategic Philanthropy

[Greater Houston Community Foundation](#) seeks a growth focused, service-oriented advisor who brings relationship management experience, philanthropic consulting, and a business operations background to this role. An understanding of private foundation and nonprofit governance, compliance, rules, and best practices is also required. In addition to managing and stewarding an existing portfolio of unique clients, the Client Advisor will contribute to team goals and increasing the department's scale and impact by cultivating and on-boarding new clients in this core line of business.

This position requires a strong commitment to working in a team environment, adaptability, sound organization skills, flexibility, and the ability to manage high-performing client relationships by completing time sensitive and potentially complex items. Strong interpersonal and communication skills with respect for confidentiality at every level is required. The ideal candidate has experience working in professional services for high net worth and ultra-high net worth individuals or direct experience working with private foundations, a private bank, financial services, a trust entity or family office. This position will report to the Managing Director, Strategic Philanthropy.

Salary Range: 85,000 - \$95,000

This is a full-time, salaried, exempt position with hybrid-work flexibility. In addition to salary, the candidate will participate in GHCF's employee benefits plans, including comprehensive health, dental and vision insurance coverage, generous PTO plan, and 401(k) with an organizational matching component.

Please apply through our [online application form](#). **Applications will be received until October 7, 2022.** We will contact those candidates who most closely match our requirements. We thank you in advance for your interest.

### **Key Responsibilities**

The Client Advisor holds an important position within the Strategic Philanthropy team and GHCF. This position is responsible for leading a client's overall strategy, governance, compliance, operations, and general grants management processes for a robust portfolio consisting of private and family foundations, supporting organizations, field of interest funds, designated funds, and other philanthropic entities.

The Client Advisor's role includes the following:

- Manage a portfolio of up to 25 philanthropic client organizations, with a focus on serving, encouraging, informing, and facilitating a client's philanthropic activities and grants via a strategic lens and good governance.
- Oversee and support clients' Board activities, governance and compliance activities, proper receipt of donations/assets and grant-making actions by stewarding annual strategy,

ensuring perpetuity of the clients' mission and collaboratively leading operations provision by other GHCF or external teams.

- Participate in new business cultivation and on-boarding new clients; drive annual revenue management via annual client contract renewals and client growth and retention plans
- Lead client special projects, consulting, or research initiatives, as requested and contracted, by client
- Ensure proper grant administration and management, via GHCF online platform Zengine
- Arrange, lead, and report on site visits/other special non-profit engagement, as requested by client
- Provide client service support or other GHCF special project support, as requested by Managing Director
- Provide departmental business continuity for small, dynamic team of 3 (PTO/out of office support)
- Represent GHCF at GHCF events and in the community
- Comport a professional and ethical demeanor, demonstrating respect for all and recognition of the importance of each role in fulfilling our clients & GHCF's overall mission and goals

### **Desired Qualifications**

We seek a team member with experience in a relevant professional capacity who is enthusiastic about supporting the diverse passions, missions, and excellent organizational operations of our donors and clients. The candidate must thrive on challenges and be comfortable in a fast-paced, high performance-standards and demanding environment. The successful candidate will have a proven track record of success in working collaboratively with a diverse team (skills, experience, and professional backgrounds) and servicing clients with positivity and professionalism. Specifically, the successful candidate will possess:

- Bachelor's degree with 8-10+ years of experience in a professional-services related field or activity; Private Foundation experience and/or an advanced degree a plus
- Working knowledge of IRS regulations, governance & compliance matters - ability to set and adhere to governance and compliance standards, metrics, and outcomes
- Strong understanding of macro-level finances and financial literacy acumen
- Understands the "big picture" combined with the ability to correlate and analyze all types of financial, grant, or various other data & details to effectively synthesize research, potential solutions, outcomes, or impact
- Superior interpersonal, written, and oral communication skills
- A high degree of professionalism, confidence, and flexibility that effectively builds trust and a collaborative work environment with clients and colleagues of diverse backgrounds and personalities

- Strong planning and implementation skills; able to manage and attain competing deadlines and communicate effectively regarding progress of deliverables
- Comfortable working in a fast-paced, ever-shifting environment, while maintaining high-quality, positive, solutions-focused outcomes
- Ability to handle confidential information
- Grace under pressure - ability to handle clients in a positive and professional manner, while maintaining quality customer service and ensuring donor satisfaction as a top priority
- Excellent judgment, integrity, and commitment to personal accountability
- High proficiency in Microsoft Office suite (Word, Excel, PowerPoint, and Outlook), Salesforce, database management systems and use of internet; willingness to learn GHCF customized software and databases

**Physical Requirements**

- Ability to lift, carry, push, pull or otherwise move files up to 5 pounds frequently
- Ability to stoop, kneel, crouch, or reach frequently
- Ability to remain in a stationary position 65% of the time
- Ability to move about inside the office to access file cabinets, office machinery, etc. 35% of the time
- Ability to move/drive external of the office, for various appointments at the client site or elsewhere in the Greater Houston community for meetings and appointments.

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The statements herein are intended to describe the general nature and level of work being performed by employees and are not to be construed as an exhaustive list of responsibilities, duties and skills required of personnel so classified. Furthermore, they do not establish a contract for employment and are subject to change at the discretion of the employer.

GHCF is an Equal Opportunity Employer and does not discriminate against a job applicant or an employee because of a person's race, color, religion, sex (including pregnancy, gender identity and sexual orientation), national origin, age (40 or older), disability or genetic information. GHCF does not discriminate against a person because the person complained about discrimination, filed a charge of discrimination, or participated in an employment discrimination investigation or lawsuit.