

FINANCIAL SERVICES MANAGER

Posting Date:	5/10/2023
Department:	Operations
Preferred Location:	Louisville Metro
Posting Number:	HR 23-5-03

Position Summary

This position is responsible for the day-to-day coordination of the team responsible for the critical tasks associated with the administration of Presbyterian Foundation and New Covenant Trust Company accounts. This includes gift processing, account establishment, remittances, fees, statement production, common fund processing, custody and security administration, and estate administration.

Scope and Breadth of Position

This position reports to the Vice President of Operations.

Essential Job Accountabilities

- Provide leadership to the Funds Services team by providing goals, direction, guidance, support and development as needed.
- Consistently provide accurate and timely results to internal and external clients.
- Manage the level of data integrity originating from the Fund Services unit.
- Responsible for fund and participant accounting for over 7,000 accounts. This includes common fund processing, net asset valuation, participant account valuation, remittances, fees and statements.
- Oversees gift processing and administration for permanent endowment funds.
- Responsible for security trading and settlement and custody of assets.
- Ensure policies and procedures are current and proper controls are in place for all tasks.
- Promotes teamwork and cooperation throughout the organization.

Relationships

Strong communication skills are essential. Must be a team player and possess the ability to work closely with other members of the Operations Management team. Also interacts with staff members from other departments within the organization and New Covenant Trust Company.

Experience and Job Related Requirements

- Bachelor's Degree in a Business related major or equivalent experience
- Must possess strong planning, organizational, communication, and interpersonal skills.
- Flexibility to handle multiple tasks and meet established deadlines with minimal supervision.
- 3 -5 years of experience in a leadership role guiding and coaching teams
- Strong proficiency in Microsoft applications (Excel, Word, etc.)

- Excellent research and problem-solving abilities.
- Ability to coordinate workflow, assign duties, give written and oral instructions, motivate team, maintain productive environment, and examine work for quality.
- Strong mathematical aptitude and proficiency in logical reasoning skills.
- Quick and competent learner with strong work ethic.
- Experience developing policies, procedures, and workflow design
- Knowledge and conceptual understanding of Trust Accounting Systems and Blackbaud products preferred.
- Experience working with securities preferred.
- Excellent communication skills
- Basic knowledge of the structure and mission of the Presbyterian Church (U.S.A.)

Physical Requirements

- Ability to communicate orally with management and co-workers, both individually and in a group/team. 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 computers, calculator, telephone, and copiers.

Work Environment

- The job is performed indoors in a traditional office setting. Activities include extended periods of sitting and extensive work at a computer monitor and/or calculator.

**Forward resume to Yveshia Klingman
careers@presbyterianfoundation.org**

Attn: HR Posting #23-5-03

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