



# INVESTMENT RELATIONS DIRECTOR



Jeffersonville, IN

## POSITION OVERVIEW

The Investment Relations Director is responsible for cultivating and managing relationships with donors, beneficiaries, and key constituents of the Presbyterian Foundation. This includes engagement with Endowment Service Clients, Board Trustees, OCIO, MRTI, and PRI signatories. The role involves providing tailored investment reviews, explaining financial strategies, and ensuring transparent communication on performance and spending formulas. The Director serves as the primary liaison to the Investment Committee and OCIO, oversees compliance with investment policies, and manages approvals for valuations, trades, and capital calls. Additional responsibilities include creating customized presentations, supporting educational initiatives, attending strategic events, and maintaining awareness of trends in faith-based investing. The position also manages the department budget and collaborates across teams to enhance constituent engagement.

## MORE INFORMATION

### POSTING DATE

11/21/2025

### SALARY

\$100,000 - \$110,000

### DEPARTMENT

Investment Relations

### POSTING NUMBER

HR 25-11-08

Forward resume to Yveshia Klingman at  
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## ABOUT US

Since 1799, The Presbyterian Foundation has been dedicated to gathering, stewarding, and distributing funds for mission, deeply rooted in the Reformed values that have guided us for over two centuries. We are committed to strengthening congregations and their related ministries by developing and managing funds on their behalf, fostering communities of generosity among members and constituents. Our services extend to all Presbyterians, offering a variety of giving and investment options to realize philanthropic goals, all while staying true to our faith-driven principles.

Our mission is carried forward by our Senior Staff and Trustees, whose leadership, experience, and faith values embody the dedication to our cause. They are not just stewards of resources but also of the legacy and integrity of The Presbyterian Foundation. As we navigate the future, we remain focused on impacting the world through faith, hope, and generosity, inviting you to join us in this enduring journey of mission and ministry support.

## WHY US?

**Legacy & Continuity:** Since 1799, the Presbyterian Church has upheld a vision of financial stewardship, exemplified by the creation of its oldest endowment in 1821, which continues to support our mission today.

**Exceptional Benefits:** Enjoy access to a highly affordable health insurance plan, generous vacation time, and a comprehensive benefits package that includes a pension plan.

**Positive Work Culture:** Experience a workplace that values meaningful work, fosters respect, and maintains a pleasant and supportive environment.

**Personal & Professional Growth:** Embark on a unique career path within the organization, benefiting from opportunities to broaden your expertise and personal development.

# INVESTMENT RELATIONS DIRECTOR JOB DESCRIPTION

## Position Summary

The Investment Relations Director will be responsible for developing and maintaining strong relationships with donors, beneficiaries, and constituents. More specifically, the relationships include: select beneficiaries and constituents of the Presbyterian Foundation, Endowment Service Clients, Board Trustees, Outsourced Chief Investment Officer (OCIO), Proxy Voting Provider, the Committee on Mission Responsibility Through Investment (MRTI) of the Presbyterian Church (U.S.A.), and Signatory of PRI (Principals of Responsible Investment).

## Scope & Breadth of Position

Reports to the Foundation's SVP, Strategy and Engagement and Investment Committee. There are no direct reports to this position.

## Primary Responsibilities

### FOUNDATION CONSTITUENTS RELATIONS MANAGEMENT:

- Cultivate and maintain relationships with current and potential beneficiaries and constituents.
- Understand the financial ecosystem of the PC(USA) and how they interrelate.
- Ensure knowledge of organization's products and services and offer guidance to clients and constituents.
- Act as a primary point of contact for Foundation investments with beneficiaries and constituents.
- Regularly update beneficiaries on the performance vs. goals and objectives. Ensure regular communication with relevant staff related to relationship management.
- Explain spending formula calculations to constituents with understanding of its impact on their programs.
- Provide tailored investment reviews to constituents and beneficiaries.
- Develop and implement strategy for regular engagement with, select constituents and beneficiaries to provide an investment review.
- Active engagement with the Development department such as serving as a subject matter expert, attending relevant church-facing conferences, events, meetings, etc.
- Provide investment-related educational opportunities to the Board and the Foundation's broader constituencies.
- Organize and attend events, conferences, and meetings with potential and current beneficiaries, constituents, and other strategic partners.
- Maintain working knowledge of broader trends in faith and values-based investing and serve as staff support to the Committee on Mission Responsibility Through Investment of the Presbyterian Church (U.S.A.).

### INVESTMENT COMMITTEE AND SENIOR STAFF LIAISON:

- Serve as the lead staff person to the Investment Committee of the Foundation's Board of Trustees.
- Ensure all investment management services are in compliance with investment policy statements; provide regular status reports to senior management.
- Interact and collaborate with New Covenant Trust Company staff, as needed.

### OUTSOURCED CHIEF INVESTMENT OFFICER LIAISON:

- Serve as the primary liaison to the Outsourced Chief Investment Officer (OCIO).
- Collaborate with the Presbyterian Foundation's OCIO to keep abreast of market trends and changes.
- Provide monthly approval of the valuation of common trust funds and trade approval.
- Execute occasional securities transactions as needed.
- Approve monthly capital calls. For private investments, as needed.

### DATA MANAGEMENT AND COMMUNICATION:

- Create tailored presentations to communicate relevant information to beneficiaries, constituents and Investment Committee. Some presentations to beneficiaries along with the OCIO.
- Work closely with other departments to gather information or data that can be used to engage beneficiaries and constituents.



- Responsible for the Investment Relations department budget.

Other duties as assigned

## Experience and Job-Related Requirements

- Bachelor's degree in business administration, Finance, or a related field.
- No license requirements.
- Preference for relevant certifications (e.g. CAIA, CIMA, etc.)
- Experience in investor relations, sales, or a similar role; experience in financial services industry is preferred.
- Strong understanding of financial markets.
- Excellent interpersonal skills, with the ability to build and maintain relationships.
- Fluent in communicating with Investment Committee members, beneficiaries, and donors in the life of the Presbyterian Church (U.S.A.) on a regular basis.
- Comprehensive expertise in investments and finance, including the compilation and interpretation of investment and financial information.
- Proficiency in Microsoft Office applications, databases, research, and trust/investment accounting systems.
- Excellent oral, written, and presentation skills.
- Ability to identify, prioritize, and complete essential tasks with minimal supervision.
- Meticulous attention to detail.
- Strong organizational and time-management skills.
- Ability to work collegially and effectively with other employees, trustees, vendors, beneficiaries and constituents of the PC(USA).
- Ability to work independently and as part of a team.
- Ability to represent the Foundation throughout the church, financial and investment communities.
- Ability to educate and influence others.
- Trustworthiness and person of high character.
- Flexibility in working hours may be required to accommodate different time zones of beneficiaries and constituents.
- Knowledge of or willingness to learn the polity and policies of the Presbyterian Church (U.S.A) especially as they relate to responsible investing in alignment with the church's values.

## 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 computer terminals, 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.
- Moderate travel expected to meet with investors or attend relevant events.

*The Presbyterian Church (U.S.A.) Foundation, along with its subsidiary New Covenant Trust Company (NCTC), are Equal Opportunity Employers. We provide equal opportunities in all employment positions, regardless of age (as defined in the Age Discrimination in Employment Act), disability, sex, national origin, race, color, creed, religion, sexual orientation, gender identity, gender expression, or veteran status.*

