New Covenant Trust Company is looking for a **Fiduciary Tax and Charitable Gift Specialist** to join our dynamic team!

- **Can you join in our passion for doing everything to revolve around helping our community flourish? Do you want to make an impact around the world from your hometown**? *We are for you!*

- **Are you passionate about developing strategies and building relationships to support the organization's initiatives of charitable gift planning and fiduciary tax services of New Covenant Trust Company?** If you believe that you can lead our organization's fiduciary tax services and our charitable gift planning services — *we are for you!*

- **Do you want to be part of a culture where employees are seen and heard?** If you want to be part of a global organization that respects and rewards their employees — *we are for you!*

- **Who Is New Covenant Trust Company?** NCTC is a full-service financial planning, investment management and trust services firm. Using a consultative and collaborative approach, we help our clients customize investment planning and asset management solutions based on their specific needs and goals. Thanks to a unique blend of our expertise and as a wholly owned subsidiary of the Presbyterian Church (U.S.A.) Foundation, we have everything it takes to meet all our client's investment, planning and fundraising needs. In all our work, we remain focused on the Reformed values that have guided our stewardship and investment for more than 200 years.

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Let us tell you a little bit about what we are looking for in a **Fiduciary Tax and Charitable Gift Specialist**.

**Responsibilities:**

- Responsible for NCTC's delivery of fiduciary tax services that include trust, common fund, partnership, investment, and other tax returns. This might include outsourcing certain aspects of this work while retaining oversight and responsibility for these duties.

- Research and stay current on charitable gift planning legislation and best practices. Educate prospects, clients, their advisors and internal staff about charitable giving, financial planning and estate planning options and techniques.
- Consult with prospective clients and their advisors to facilitate new relationships and gather assets.
- Work closely with trust officers, investment officer, legal counsel and the operations area in all facets of gift, trust and tax administration.
- Work closely with clients, Presbyterian constituencies and other interested prospects employing a servant style work ethic to fulfill the reasonable needs of the client and support and enhance the relationship.
- Serve in a technical and advisory role regarding inquiries of gifts, taxes and charitable products and services.
- Communicate relevant information on fiduciary tax services and charitable gift services to NCTC and Foundation staff.
- Work with prospects to build trusted relationships.
- Support the efforts of the Ministry Relationship Officers and institutional and church clients.
- Maintain strong technical knowledge of IRS regulations related to charitable giving, financial and estate planning, including tax planning. The incumbent uses this knowledge to help educate prospects, clients, and internal staff.
- Keep abreast of current developments and trends in the financial planning, trust, charitable giving and investment marketplace. Provide at least quarterly training to internal staff on trends and/or upcoming regulations. Provide at least quarterly communications to NCTC clients on topics of interest.

**Requirements:**

- Expertise in gift, finance, tax and estate planning options and regulations.
- College degree required, CPA, CFP® or LLM tax preferred.
- Position requires professional interpersonal skills inclusive of excellent oral and written communication.
- Good reasoning ability is required to solve a wide range of business problems.
- Ability to apply statistical and mathematical calculations required.
- Able to understand and utilize financial reports and legal documents to conduct business.
- Ability to travel up to 25% of the month is required.

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## *If you are interested in joining our mission, please take the following steps:*

- Read the job description thoroughly.
- Email your cover letter and resume to Emily Possidento at Emily.Possidento@mcmhrsg.com.

*We look forward to reviewing your resume!*