NEW COVENANT TRUST
A Subsidiary of the Presbyterian Foundation

Presbyterian FOUNDATION

Job Opportunity Posting

Posting Date:	6/13/2023
Removal Date:	6/20/2023
Title:	**Assistant VP – Financial & Investment Planning Professional-Northeast**
Grade:	22 Exempt
Department:	Trust
Preferred Location:	Louisville Metro
Posting Number:	HR 23-6-02

Position Summary

This client-facing position within the Client Engagement Team has the responsibility of maintaining consistent and ongoing contact with existing clients and prospective clients of New Covenant Trust Company N.A., which are primarily Presbyterian constituencies and specified opportunities of the general public based in the Northeastern United States.

Scope & Breadth of Position

This position reports directly to the VP Business Development and Financial Advisor of New Covenant Trust Company.

Essential Job Accountabilities

- Assist in the development and execution of strategic plans to conduct NCTC's on-going client retention, business development, and communication efforts in the Northeastern United States through face-to-face visits, phone calls, conference calls, video conference calls, and electronic correspondence.
- In cooperation with Foundation leadership and Ministry Relationship Officers, seek opportunities for additional Foundation and NCTC solutions and services.
- Provide regular reports updating NCTC leadership on the status of client relationships, communications, and client contact efforts.
- Work closely with Trust Services, the Investment Team, Compliance, Ministry Relations Officers, and Operations to ensure that accounts are managed under the terms and conditions specified by clients and in compliance with policy and regulations.
- Keep abreast of current developments and trends in the capital markets, trust, charitable giving, and investment product marketplace.
- Attend training and professional programs necessary to maintain abilities and any previously earned accreditations.

Relationships

- Prepare quarterly and annual plans related to client contacts and regularly report progress.
- Consult with prospective and existing clients to facilitate new NCTC and Foundation opportunities.
- Accountable for working with the overall NCTC Team in preparing information required to increase awareness of NCTC's services and resources, grow NCTC's assets under management, and appropriately manage existing relationships and provide reports to existing clients.
- Lead asset gathering activities through completion of the business development process — including qualifying opportunities, preparing proposal materials, scheduling and conducting proposal meetings,

and following up on next steps — and involve additional Foundation and NCTC colleagues as appropriate so that new clients of NCTC can be served by multiple colleagues from within NCTC.

- Participate in scheduling, preparing review materials, and conducting review meetings with current NCTC clients on an ongoing and consistent basis.
- Work together with Trust Services, the Investment Team, Compliance, and Operations in all facets of gift, trust and investment administration.
- Work closely with all Foundation and NCTC colleagues, prospective and existing clients, Presbyterian constituency, and other interested stakeholders employing a servant style work ethic to fulfill the reasonable needs of the client and to support and enhance the overall relationship.

Experience and Job-Related Requirements

- College degree required with a preference for degrees in economics and finance, as well as experience in communications and client interactions. Advanced degrees and professional designations such as the CFP® or CIMA® are preferred.
- At least 3-5 years of experience and thorough knowledge in the areas of financial planning as well as trust and investment management business development, communications, and client service.
- Position requires professional interpersonal skills inclusive of excellent oral and written communication.

Physical Requirements

- Ability to verbally communicate with management, co-workers, and clients both individually and in a group/team setting. Regular use of the telephone, video, 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.
- The ability to travel up to 60% of the year is required. Regular transport of suitcase and laptop will be required.
- Good reasoning ability is required to solve a wide range of business problems.
- Able to apply statistical and mathematical calculations required.
- Ability to understand and utilize financial reports and legal documents to conduct business required.

Work Environment

- The job is performed indoors in a traditional or hybrid office setting.
- Activities include extended periods of sitting and extensive work at a computer monitor and/or telephone.
- Frequent travel and video/conference call meetings
- Preferred location – Louisville, KY, Cincinnati, OH, Indianapolis, IN, Nashville, TN, Northeastern United States with ready access to a major airport (e.g., Boston, New York City, Newark, Philadelphia, Pittsburgh)

Forward resume to Yveshia Klingman

Yveshia.Klingman@presbyterianfoundation.org

Attn: HR Posting #23-6-02

"The Presbyterian Foundation is an Equal Opportunity Employer"