



Job Opportunity Posting

Posting Date:	6/2/2023
Removal Date:	6/9/2023
Title:	Financial & Investment Planning Associate
Grade:	19 Exempt
Department:	Trust
Preferred Location:	Louisville Metro
Posting Number:	HR 23-6-01

Position Summary

This client-facing position has the primary responsibility of supporting the Client Engagement Team's consistent and on-going contacts with prospective & existing clients of New Covenant Trust Company, N.A. (NCTC) which are primarily Presbyterian constituencies and specified opportunities with the general public. This position will become familiar with all aspects of NCTC's key functions.

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 tasks to 1) primarily support the client retention, growth, and communication efforts of the Client Engagement Team by assisting with the following: a) preparing and reviewing new business proposals and existing Client review materials for external Client communications such as face to face visits, phone calls, conference calls, video conference calls, and electronic correspondence, b) providing follow up support after Client interactions – such as internal communications with NCTC/FDN colleagues, conducting research within files, systems, and with colleagues, and coordinating follow up responses to Clients and prospects, and c) support any new business development opportunities from prospective Clients as well as those arising from on-going efforts to support existing NCTC clients.
- In cooperation with Foundation leadership and Ministry Relationship Officers, support opportunities for additional Foundation and NCTC solutions and services.
- Participate in the process of preparing and providing regular reports updating NCTC Leadership on the status of client relationships, communications, and client contact efforts.
- Work closely with Client Engagement, Trust Services, Investments, Compliance, Ministry Relations Officers, and Operations personnel 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

- Participate in the preparation of quarterly and annual plans related to client contacts and regularly report progress.
- Consult with existing clients to facilitate new NCTC and Foundation opportunities.
- Accountable for working with the overall NCTC Team in preparing information required to appropriately manage existing accounts and provide reports to existing Clients.
- Participate with Client Engagement Team and Trust Services Team in making appropriate introductions to new Clients of NCTC for future communications.
- In coordination with Client Engagement & Trust Services, participate in scheduling meetings with prospective and existing NCTC clients on an on-going and consistent basis.
- Work closely with existing clients, Presbyterian constituency, and other interested prospects 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/or professional designations such as the CFP® or CIMA® are preferred.
- At least 1-3 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 Leadership, all colleagues, 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 30% 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 office setting.
- Activities include extended periods of sitting and extensive work at a computer monitor and/or telephone.
- Travel and video/conference call meetings – many of which occur during the evening hours.
- Role location – Jeffersonville, IN - Home office of the Presbyterian Foundation & New Covenant Trust Company

Forward resume to Yveshia Klingman
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Attn: HR Posting #23-6-01

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