



We share your faith  
and your values.

*We're your trust company.*

## ADMINISTRATIVE OFFICER

*Hybrid role*

### POSITION OVERVIEW

This position is responsible for accepting new business and overseeing the ongoing administration of investment management accounts. Working closely with the Client Engagement and Trust Services teams, this person oversees new account setup, directs funds disbursement and coordinates audit preparation as needed.

### ABOUT US

NCTC empowers churches, church institutions and church members to create and sustain healthy and vibrant ministries through faithful stewardship of their investments. A subsidiary of the Presbyterian Foundation — America's second-oldest charitable foundation, founded in 1799 — NCTC was established in 1998 to offer full-service financial planning, investment management and trust services. Our purpose is driven by the shared faith, values and integrity of the Presbyterian Church (U.S.A.).

We are passionate about taking exceptional care of each and every client while advancing the mission of the church. As a limited purpose national bank federally regulated by the Office of the Comptroller of the Currency (OCC), we are the trusted fiduciary partner our clients rely on. We've experienced tremendous growth over the past decade, with assets under management increasing from \$47 million to over \$600 million. NCTC is now focused on future expansion of our services to help even more churches thrive.

### WHY NCTC?

#### WE VALUE OUR PEOPLE

NCTC embraces a person-centric philosophy because we know that our team members are our greatest assets.

#### WE OFFER EXCEPTIONAL BENEFITS

We offer a highly affordable health insurance plan, generous paid vacation time, and an outstanding overall benefits package.

#### WE PROVIDE GROWTH OPPORTUNITIES

An expanding firm that promotes from within, you will have the chance to grow with us, and play a pivotal role in NCTC's strategic direction.

#### OUR CULTURE IS VALUES-DRIVEN

Our culture is rooted in integrity, collaboration, and servant leadership, thanks to our focus on shared values and a purpose greater than ourselves.

#### WORK/LIFE BALANCE IS OUR PRIORITY

We offer a flexible, hybrid work environment that's designed to promote work-life balance and put people above profit.



*See next page for the full job description and instructions on how to apply.*

# ADMINISTRATIVE OFFICER JOB DESCRIPTION

## POSITION SUMMARY

This position directs and coordinates activities nationally for assigned accounts relative to creating and administering investment management accounts in accordance with the instrument/terms that created it (i.e., trust agreement, will, court order, or contract) for New Covenant Trust Company (NCTC).

## SALARY

\$60,000-\$63,000 annually

## SCOPE & BREADTH OF POSITION

This position reports directly to NCTC's VP, Director Trust Relationship Services and has no direct reports.

## ACCOUNTABILITIES

1. Ongoing administration for investment management accounts.
2. Makes decisions affecting the ongoing administration of investment management accounts of assigned accounts in accordance with NCTC policies and procedures.
3. Audit preparation and requests as needed.

## MAJOR DUTIES AND RESPONSIBILITIES

This position is an integral part of the organization. The Administrative Officer has the responsibility for accepting new business and overseeing the ongoing administration of assigned accounts. The Administrative Officer oversees the new account paperwork process and works closely with the Client Engagement team and Trust Services team. The Administrative Officer directs disbursements of funds according to the investment management agreement and NCTC policies and procedures.

## RELATIONSHIPS

The Administrative Officer is a main point of contact for their assigned clients. The Administrative Officer reviews all the documentation pertaining to the account and ensures that the administrative documents are created, signed, and are in good order prior to funding the account as well as administering the account per the directives of the client. The Administrative Officer will analyze, recommend, and refer clients who have additional estate planning needs to the appropriate resources.

The Administrative Officer also serves as the liaison coordinating the team of departmental personnel from legal, investment, tax, development, and operations to facilitate the creation and administration of the investment management account.

## EXPERIENCE AND JOB-RELATED REQUIREMENTS

- College degree required.
- Experience working in financial services, preferably in investment management services or trust administration.
- Excellent people skills required with a willingness to communicate with clients and take responsibility for meeting client needs promptly.
- Ability to respond to emerging needs, work on many diverse projects, and coordinate with diverse groups.
- Strong problem-solving skills and ability to manage competing priorities.
- Proven financial, organizational, research, administrative and computer skills.
- Must be able to work well with inside and outside clients utilizing oral and written communications skills.
- Possess the ability to plan well and to handle multiple tasks.
- Ability to handle interruptions such as incoming phone calls, urgent client emails or situations that may arise.
- Ability to calculate spending formulas as needed.

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# ADMINISTRATIVE OFFICER JOB DESCRIPTION

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## PHYSICAL REQUIREMENTS

- Ability to communicate orally with management, co-workers, constituents, and public both individually and in a group/team environment.
- Regular use of the telephone and e-mail for communication is essential.
- Sitting for extended periods is common.
- Hearing and vision within normal ranges are essential for typical 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 telephone.

To apply, forward your résumé to Yveshia Klingman at

[Yveshia.Klingman@presbyterianfoundation.org](mailto:Yveshia.Klingman@presbyterianfoundation.org)

Attn: HR Posting #HR 24-10-13

*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.*