



Job Details

Charitable Giving Associate W.S.W. Foundation. Assisting Clients through the "CRT" Charitable Remainder Trust, "CGA" Charitable Gift Annuities or "CRM" Charitable Reverse Mortgage Process. Working as a liaison to provide personal guidance, information, as well as assistance with the Financial Advisors, Attorneys, Accountants, and the W.S.W. Foundation in order to achieve maximum financial and tax benefits.

Charitable Giving Associate will provide oversight and direct support to complete the operations, clerical, accounting, and administrative tasks. Must demonstrate initiative, analytical abilities, strong interpersonal relations, superior customer service, and the ability to effectively communicate orally and in writing. This position will have frequent contact with donors, interns, volunteers, staff, board members, community leaders, business organizations, W.S.W. Foundation President and the general public. Is responsible for professionally, and as required by law, managing confidential and sensitive information.

Job Category

Charitable Trust Associate

Level

Experienced w/Degree

Job Locations

San Clemente - Newport Beach

Position Type

Full Time - 40

Education Level

College Experience

Job Shift

Day M-F

Vacation

1 week after 1 year

RESPONSIBILITIES

- Recruit, supervise interns and volunteers. Ensure appropriate training as required.
- Develop, implement, and oversee effective and appropriate operations policies and procedures. Provide recommendations for CRT, CGA & CRM programs operations improvements.
- Provide administrative support to the Financial Advisors, Attorneys & Accounting Staff, as needed.
- Hold and facilitate operations meetings as needed. Schedule, notify attendees and make arrangements as needed or required. Responsible for processing, compiling, and distributing reports and exhibits as appropriate for the President of the W.S.W. Foundation.
- Manage/supervise databases/spreadsheets ensure that databases are current and complete in accordance with the needs of the organization and stakeholders.
- Maintain lists of clients, vendors, donors, volunteers, partners, etc.
- Assemble data and prepare reports as needed.

- Manage warehouse inventory and invoicing processes and other onsite accounting related tasks, ensuring integrity and including follow-up.
- Process Trust applications. Implement strategies for effective customer service.
- Successfully manage multiple clients and meet set timeframes.
- Communicate with W.S.W. Foundation staff to provide/ensure support and coverage as needed.
- Organize, manage, oversee, and coordinate Zoom & Meetup Monthly meetings.
- Answer incoming calls and respond to inquiries.
- Manage client lists and communicate with clients regarding needs and wanted items.
- Manage/respond to incoming email appropriately and in a timely manner.
- Maintain an accurate calendar of organizational events and meetings.
- Maintain confidentiality of all materials and information as appropriate.
- Use good judgment and tact in dealing with internal and external inquiries.
- Uphold legal standards.
- Manage needed office supplies within budgetary constraints.
- Assist in the coordination and execution of special projects as needed.
- Coordinate and ensure the maintenance of office and equipment.
- Perform other duties as requested/assigned.

EFFECT ON END RESULT

- To ensure needs of donors and clients are met.
- To ensure the Trust program is operated in compliance with applicable contracts, agreements, scopes of work and funding source requirements.
- To ensure the Trust program is operated in accordance with the W.S.W. Foundation policies and procedures.

Qualifications (REQUIREMENTS)

- Bachelor's Degree with a combination of education and experience normally represented by post-secondary education, equivalency, or training, in retail management and office business administration or related fields. Supervisory experience is also preferred. The following are also needed qualities and expertise:
- Excellent organizational skills and detail oriented.
- Proficiency in Microsoft Office products including but not limited to Word, Excel, Power-Point, Publisher and Outlook and other related computer programs.
- Donor software management preferred.
- Basic knowledge of Quick Books or similar accounting software.
- Self-starter/self-directed with strong interpersonal skills.
- Strong oral and written communication skills.
- Ability to successfully manage multiple tasks and prioritize tasks.
- Ability to work with persons of diverse backgrounds, skills and abilities.