

Client Services Associate



Excellence in Giving is a full-service philanthropic advisory firm founded on Christian principles. Our firm provides customized solutions to help Ultra High Net Worth donors set and achieve charitable giving goals. With our wisdom, clients achieve impact and experience the joy of generosity!

Position Summary:

The **Client Services Associate** provides support to Giving Advisors in serving clients through project management, grant management, and day-to-day assistance with client issues to support the goal of total client satisfaction. This is a full-time position \$50,000-\$60,000 per year, and reports to a Senior Giving Advisor. This position is located in Colorado Springs, work will be performed on-site with some opportunity for remote work.

Personality Profile:

You're a perfectionist and like to be sure the details are right. You're a great listener, always looking for ways to help and solve problems for people thoughtfully and intentionally. You're organized, creative, and highly administrative. Multitasking is no problem, and you are motivated by setting your own goals and seeing how much you can accomplish in a day. Your upbeat attitude gets you places, and you're willing to do big or humble tasks with a can-do perspective. You take pride in operating with efficiency and excellence. Above all, you have a heart to bless and serve others.

Skills & Qualifications:

- Gifted administrative and project management skills
- Fast-paced multitasker with strong time management and relationship management skills
- Exemplary critical thinking and ability to make decisions on how to present information in a clear, concise format
- Extremely detail-oriented and careful with numbers; double-check everything to get it right the first time
- Exceptional writing and proofreading skills, communicating with kindness and brevity
- Ability to be diplomatic, tactful, professional, and collaborative
- Intermediate to advanced technical skills in Excel and Adobe. Salesforce CRM and InDesign experience a plus
- Experience editing, including developmental and copy editing, desired
- Bachelor's degree in related field or equivalent work experience.
- 2+ years' experience working in a professional or office setting, preferably nonprofit or financial industry
- Involvement with faith-based nonprofits desired

Job Responsibilities:

- Support Giving Advisors to serve clients with administrative duties and project management
- Support collection, review and presentation of grant proposals, research, and post-grant reporting for meetings
- Monitor work toward client service plan and support activity reporting to ensure the appropriate level of service
- Create and design recurring and custom print materials for clients using Microsoft Suite & Adobe InDesign
- Edit written material and write copy for client-facing reports
- Manage projects for clients, including supporting meetings, service trips, reporting, or other projects and events
- Interface with nonprofits and clients to collect information related to client giving
- Understand client/family preferences and look for resources for personal growth and blessing

Excellence in Giving is an equal opportunity employer, and all qualified applicants will receive consideration for employment without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.

To apply send resume and cover letter to
careers@excellenceingiving.com