Excellence in Giving Job Description
Client Service Advisor

Position Summary:
The Client Services Advisor supports clients and relationship managers 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 compensated on a salary basis, reporting directly to the Director of Client Services

Personality Profile:
You are a master manager of details and solving problems for people. You're a good listener and you like being with people to brighten their day. You're also organized, creative, and a highly administrative. Multi-tasking is no problem, and you are motivated by setting your own goals and seeing how much you can accomplish in a day. You take pride in operating with excellence. Bottom line, you have a heart to bless and serve others.

Skills & Qualifications:
- Strong project management skills, detail-oriented and able to multitask in fast-paced environment
- Self-starter, must work proactively with minimal supervision
- Strong time-management skills and ability to meet deadlines
- Must have clear, concise, and friendly communication skills – both verbal and written
- Ability to be diplomatic, tactful and professional
- Positive, team-oriented and solution-oriented attitude
- Ability to maintain confidentiality
- Computer fluency, Microsoft Office Suite proficiency, and Salesforce a plus
- Bachelors degree required
- 5+ years experience serving customers, preferably in financial or philanthropy setting
- Involvement with faith-based nonprofits desired

Job Responsibilities:
- Interact with clients and Relationship Managers to manage service plan for accounts
- Develop and maintain relationship with client, family, staff, and other professional contacts
- Monitor client top nonprofits and suggests opportunities for interaction, including reporting highlights, site visits, changes or issues to Relationship Manager and/or clients.
- Manages special projects for clients, including planning for board meetings, service trips, management of scholarships, etc.
- Plan and schedule meetings, phone calls, and special events for clients
- Monitors service agreement details and renewal dates, and looks for opportunities to increase or add services
- Understands client/family preferences and looks for resources for personal growth and blessing