

## Position Description

<b>Job Title:</b>	Director, Client Services
<b>Reports to:</b>	President/CEO
<b>FLSA Status:</b>	Exempt
<b>Salary Range:</b>	\$100,000 to \$150,000

### Introduction

United Church Funds (UCF), a not-for-profit corporation and associated ministry of the United Church of Christ (UCC), provides responsible, values-aligned investment management services to over 1,200 churches, ministries and other faith-based organizations. UCF offers customized investment portfolios and prudent investment strategies that provide competitive returns while also reflecting its clients' values in seeking to achieve a just world. UCF also offers endowment governance consulting and planned giving services.

### Position Overview:

The Director of Client Services will be a team leader, supervising a staff of client services professionals who provide top-tier client service experiences to UCF's institutional clients. The Director will be responsible for ensuring a seamless client experience between front- and back-office operations for both new and existing clients, including responses to inquiries, facilitating financial transactions, and providing other relevant services for the management of investment accounts. This position requires a high degree of collaboration and communication with other teams in the organization and the ability to work in person and remotely as needed. This position is salaried, with full benefits, and does not offer additional compensation via advisory fees or commissions.

### Primary Responsibilities:

- Provide hands-on management for the execution of a high-quality client services experience, including being ultimately responsible for the prompt handling of all client inquiries, accurate preparation and review of all transaction requests and daily processing, and helpful responses to all other client needs.
- Supervise client services team by ensuring that staff are available to respond to client requests (by email or phone), monitoring daily workflow and processes, assisting with tasks as needed (such as during heavy call periods at mid-month, month end or quarter end), and providing opportunities for training and professional development.
- Monitor client feedback and operational procedures and constantly seek to identify opportunities and efficiencies, as well as to help develop or create solutions that improve operations and productivity.
- Collaborate with Vice Presidents (Finance and Administration, and Institutional Relationships) in creating an overall culture of excellence, efficiency and accountability.

### Job Requirements:

- Bachelor's degree required; Master's degree, professional certification or financial services license strongly preferred.
- Strong interpersonal and relational skills that support a client-first environment.
- Familiarity with or ability to understand and work with the structures, relationships and polity of the United Church of Christ, as well as a strong commitment to respecting,

upholding and advocating for the theological and social justice values expressed in UCF's mission.

- Good understanding of capital markets and investment-industry client services operations and best practices.
- Outstanding written and verbal communication skills, and strong leadership qualities with willingness to take initiative and to work as a team player with colleagues.
- Demonstrated abilities to use and interact with various forms of technology, including systems, programs and interfaces used with clients (examples: Salesforce, Innotrust/Innovue, Zoom and other videoconferencing platforms, MS Teams, MS Office).
- Ability to work in a hybrid setting, utilizing virtual communications (e.g., Zoom and MS Teams), effectively manage multiple agendas and priorities, and respond timely and effectively to all client/team communications (email, texts, phone calls and voicemail).