



Position Title **GRANTS ADMINISTRATOR**

Reports to Director of Grant Administration

Classification Non-Exempt

ABOUT AEF

Founded in 1993, American Endowment Foundation fills a unique role as America's largest independent donor advised fund program – a national, public charity. AEF provides highly personalized service to donors and their trusted advisors, offering great flexibility in accepting different types of simple and complex assets. Additionally, AEF uniquely offers open investment architecture and at the donor's recommendation, AEF can enable their donors' wealth advisors to manage the investments in their clients' fund accounts on their preferred custodial platform.

POSITION SUMMARY

The Grants Administrator certifies that all grants from the assigned donor group are sent to qualified charities as recommended and that the process is timely and accurate. In addition, this position ensures that the grant recommendation accurately reflects the donor's request, confirms funding is available for the grant, and the request is processed in a timely manner. The Grants Administrator is responsible for the activities of AEF, both before and after the awards process, and serves as the primary contact with the donor through the grants process.

ESSENTIAL RESPONSIBILITIES

1. Under guidance of the Director and using established workflow and processes, ensures grants are properly processed and sent.
 - a. Communicates with donors and financial advisors to receive and document grant recommendations.
 - b. Ensures signature on manual grant recommendation form is valid and accurate.
 - c. Checks fund account balances in accounting system.
 - d. Learns and applies IRS rules regarding donor advised funds and granting guidelines.
 - e. Qualifies charities to ensure they are in good standing and approved by the IRS.
 - f. Qualifies grants to define its specific purpose is in compliance with AEF and IRS regulations
 - g. Prepares appropriate letter, selecting from established language, to accompany each grant check.
 - h. Prints checks, or prepares ACH or wire transfer, for all outgoing grants daily and ensures a copy of each check and letter is stored electronically in document management software.
 - i. Verifies the accuracy of all information on each check and letter.
 - j. Follows up with the charities to confirm receipt of grant if check remains outstanding.



2. Using established standards and deadlines for grants processes, reviews proposals for completeness and ensures compliance with AEF standards.
 - a. Assumes responsibility for ensuring that the grants assigned to this individual are properly prepared and sent.
 - b. Coordinates with Grant Administrator(s) to comply with requirements and ensure accuracy and timeliness.
 - c. Communicates clearly and accurately with Accounting and Fund Administration Departments.
 - d. Maintains records of funding sources and grant applicants.
3. Carries out responsibilities with an understanding of the culture and importance of AEF.

Qualifications:

- Bachelor's degree or three years relevant work experience
- High degree of proficiency in Microsoft Office, specifically Word and Excel
- Skill in organizing information and attention to detail
- Excellent written and verbal skills
- Team oriented