Position Title: DEVELOPMENT ASSOCIATE
Reports to: Sr. Development Associate
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 Development Associate is a member of the inside development team for AEF. The Development Associate will assist in bringing in new donor funds through inbound inquiries and direct outreach. This individual supports the overall activities of the Development Manager and the team in achieving the goals and objectives of the development department, including direct support of development managers in execution of the firm specific strategies. The Development Associate will onboard financial advisors and provide ongoing support to financial professionals in the use and administration of donor advised funds.

ESSENTIAL RESPONSIBILITIES

1. Assists in implementing the development strategy as determined by the development team.
   a. Screens potential new financial advisor relationships identified through marketing outreach efforts.
   b. Assists Development Manager with the closing of new donor advised funds by following AEF’s established procedures.
   c. Makes outbound calls to assist in the opportunity follow-up and procedure to provide the financial advisor and associate with a clear understanding of how to work with AEF.
   d. Follows up with advisors, their associates and AEF staff on issues relating to new DAF applications, account transfers or booking gifts.
   e. Answers questions from financial professionals.
   f. Assists Development Manager in preparing presentation materials and event planning.
   g. Assists AEF staff with tracking assigned accounts in the account aggregator.
2. Provides service to financial professionals regarding their existing donor advised fund
   a. Answers incoming calls from financial professionals regarding their existing donor advised fund; including phone coverage as needed.
   b. Researches solutions to questions and issues raised by financial professionals.

3. Acts as the point of contact between Development Managers and AEF Departments.
   a. Works with Fund Administration and Financial Operations Departments to gather information necessary to complete DAF application and book new gifts.
   b. Assists the Development Department staff as needed and assigned.

4. Manages contacts and opportunities in Salesforce
   a. Assists with the maintenance and updating of the Salesforce database for Development Managers, including contacts, opportunities, donor funds, cases and other Salesforce functions.
   b. Enters and maintains information in Salesforce to maintain Development pipeline.

5. Carries out responsibilities with an understanding of the culture and value of AEF.

QUALIFICATIONS

- Bachelor’s degree preferred
- Experience in the financial services industry, such as investments, insurance and/or banking. Knowledge of financial markets and banking terms preferred.
- Ability to build and maintain new and existing business relationships with clients by providing prompt and accurate service
- Sales or sales support experience
- Salesforce or equivalent CRM experience
- Superior interpersonal skills, organizational and client service skills
- Strong analytical skills with high attention to detail and accuracy
- Intermediate MS Office knowledge and experience
- Adaptable to change
- Professionalism