RenPSG
PHILANTHROPIC SOLUTIONS GROUP

Client Executive

About RenPSG

RenPSG provides complete philanthropic solutions through technology-enabled business services including cloud apps, consulting, and administration. We provide technology and service so our clients can focus on their donors' giving and their own growth.

Headquartered and operated in Indianapolis, Indiana, RenPSG is the largest independent philanthropic solutions provider in North America. With 30 years of industry knowledge and experience, RenPSG delivers custom solutions that include tax expertise, accounting support, and impeccable client service, all through our proprietary cloud computing technology. We count financial services firms, elite nonprofit organizations, and leading community foundations as our partners. Currently, RenPSG services $16 billion in assets, including charitable trusts, donor-advised funds, pooled income funds, endowments, and private foundations.

Client Executive

Our Client Executives are organized and detail-oriented, serving as a primary point of contact for our clients. They're responsible for understanding recorded financial transactions for donor trusts, trust rules and regulations and performing research to follow up verbally and in writing with clients. A positive attitude enables them to build strong client relationships and also work as a cross-functional, internal team member. Being a great listener with clients allows the Client Executive to suggest new practices and cross-sell our most successful services. This position is a combination of transaction processing and oversight and ongoing communication with clients.

Duties & Responsibilities:

- Ensure client retention, loyalty, and continued opportunities with excellent client service achieved through pro-active client contact, prompt and accurate responses, high energy and enthusiasm
- Serve as first point of contact for problem resolution
- Through daily follow-up to ensure that all statements, financial transactions, and data entry are processed in a timely manner
- Run daily/weekly/monthly reports to discover and act on exception reporting
- Maintain and update client records
- Work with clients, legal, and compliance departments to ensure that the philanthropy tool is administered in compliance with trust documents, contracts, laws, and IRS regulations.
- Promptly and accurately communicate to management and clients about amendments, adjustments, changes or errors

- Follow procedures for documenting standards or errors
- Assist in new business development by providing referrals to sales and professional services units
- Review & propose projects/processes to enhance Company effectiveness
- Exercise initiative in assisting with projects and helping where needed
- Liaison for inter-department client relationships

Knowledge, Skills & Abilities

- Experience in financial services preferred
- Bachelor's degree preferred
- Attention to detail, strong time management skills, highly organized, ability to work well with others and a desire to learn
- Client and service focused to achieve timeliness and accuracy
- Flexibility and agility to shift priorities, cross-train and contribute to individual, team and company priorities
- Strong business ethics & personal integrity
- Excellent communication skills, both verbal and nonverbal
- Microsoft Office Suite experience