Client Executive – Legal Services

The role of a 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 charitable giving vehicles including 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.

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
- Thorough 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
- Promptly and accurately communicate to management and clients about amendments, adjustments, changes or errors
- Follow procedures for documenting standards or errors
- Work with clients, staff legal counsel, and CPA's to ensure that the philanthropy tool is administered in compliance with trust documents, contracts, laws, and IRS regulations.
- Review documents and provide paralegal support as needed for staff attorneys throughout life cycle of each charitable giving vehicle.
- Prepare documents, contracts and materials for board meetings, client appointments, and regulatory filings.
- Provide coordination and administrative support for 60+ board meetings annually
- 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

- Bachelor's Degree preferred
- Paralegal experience and experience in the legal industry preferred
- Experience in financial services, non-profit and philanthropic industries a plus
- Attention to detail, strong time management skills, highly organized, ability to work well with others and a desire to learn
- Strong business ethics & personal integrity
- Excellent communication skills, both verbal and nonverbal
- Microsoft Office Suite experience