



## Director, Institutional Services

### Description - Director, Institutional Services

The Director position is responsible for managing a team that supports one or more of our institutional clients. The team is responsible for providing excellent client service through client interactions and meeting or exceeding deliverables. This includes new account set-up, processing contribution and grant activity, providing fund accounting, preparing monthly reporting and interacting with clients. This position requires excellent communication skills, strong collaboration with many personality types, and a high degree of accuracy. The ideal candidate will be self-motivated, resourceful and have impeccable time-management skills.

### Duties & Responsibilities:

- Build and maintain relationships with institutional clients and key personnel within client organizations
- Ensure strong client relationships through expectation setting, contract fulfillment, proactive communication and planning, and revenue retention and growth
- Provide staff development through mentoring, training, and individual coaching sessions to build a strong team that has the necessary tools to be successful
- Identify and implement process improvements and automation to help improve and streamline workflows
- Work cross-functionally to ensure work and relationships across departments are client-focused and produce solutions for efficiencies, revenue generation and compliance
- In collaboration with the EVP, build and manage a budget and capacity plan for the unit that includes peak season work or changing workloads, ongoing training and/or new client contracts
- Provide full management of the team including PTO management, performance reviews, salary increases, bonus distribution and KPI tracking

### Knowledge, Skills & Abilities

- Bachelor's degree or higher required
- CPA required
- Financial services and high-volume accounting experience preferred
- Management experience, including team development
- Ability to maintain a high level of activity, manage competing priorities and work efficiently in a results-driven environment
- Experience with cash processing, bank reconciliation and investment entry processing for unitized investment pools
- Effective communication skills, both verbal and nonverbal
- Possess excellent organization and planning skills
- Superior time management skills to be able to multi-task
- Self-motivated with a positive and professional approach
- Strong business ethics and personal integrity