



Executive Services Coordinator – Legal Services

The role of an Executive Services Coordinator

The Executive Services Coordinator will provide administrative support to the newly formed Legal Services team. This person will be organized and detail-oriented, and have a positive attitude that will enable them to build strong client relationships and also work as a cross-functional, internal team member.

Responsibilities

- Thorough daily follow-up to ensure that all administrative responsibilities are processed in a timely manner
- Run daily/weekly/monthly reports to discover and act on exception reporting
- Maintain and update client, donor, and board member 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.
- Provide administrative support as needed for staff attorneys throughout life cycle of each charitable giving vehicle.
- Prepare materials for board meetings, client appointments, and regulatory filings.
- Provide 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, but not required
- Experience in legal services, financial services, administration, and philanthropic industries.
- 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
- Advanced Microsoft Office Suite experience required