



Position: Member Services Associate

Location: Radnor, PA

Firm: 60-person firm managing approximately \$7 billion for approximately 550 US non-profits

Compensation: Competitive compensation and benefits package

Culture: Mission-driven, cross-disciplinary, intellectually rigorous organization

Organizational Overview

TIFF was founded in 1991 by a network of foundations and is a mission-driven, not-for-profit organization dedicated to delivering investment solutions to foundations, endowments, and other charitable institutions. Since its inception, TIFF has exclusively served the non-profit community by providing experienced manager selection and access, risk-sensitive asset allocation, and integrated member service to institutions with long-term investment horizons. TIFF provides major endowment investment capabilities to non-profits that lack the scale and in-house resources to pursue sophisticated investment strategies on their own. TIFF Advisory Services is the regulated advisory firm that administers the investment vehicles bearing the TIFF name. TIFF's mission, credo, and board membership can be found at www.tiff.org.

Team Description

The Member Services team handles all aspects of TIFF's client service and outreach efforts across all of TIFF's investment programs. The five-person team plays an integral role in cultivating relationships with prospective and existing clients and handles all aspects of client communications and servicing. Member Services works closely with the firm's outreach and investment staff as well as the financial reporting, operations, and legal teams to serve the needs of clients, or in TIFF lexicon our "members".

Position

Associates are engaged in a broad array of operational and outreach-oriented tasks and projects related to serving the needs of existing members, prospective members, and other related parties.

Responsibilities (include, but not limited to)

- Coordinate client on-boarding and initial funding/transfers
- Review and process member subscription and redemption requests
- Liaise with fund administrators on routine member reporting, such as statements, transaction confirmations, capital calls/distributions and tax documents
- Coordinate various aspects of member meetings, including preparation of PowerPoint meeting materials and scheduling, while collaborating with Outreach Directors (i.e. sales team)
- Collaborate and execute various components of TIFF's leveraged outreach efforts, such as quarterly conference calls, forum and regional roundtable events
- Update and maintain member specific information in Salesforce (TIFF's CRM) and secure member portal
- Assist with member analytics and ad-hoc requests
- Assist with the distribution of member-specific and broad-based communications
- Respond to email and call center phone inquiries

Qualifications/Skills

- Four-year college degree with strong academic track record and 1-3 years' experience in financial services or asset management business preferred, or equivalent combination of education and experience
- High degree of proficiency with Microsoft Office, with an emphasis on the use of Excel and PowerPoint
- Ability to multi-task and work effectively in a fast-paced, deadline-oriented role where precision is required
- Positive attitude and willingness to take on new challenges
- Strong organizational skills and a keen attention to detail
- Ability to work in a dynamic, team environment
- Exceptional written and oral communication skills
- Experience with Salesforce a plus