HIGHGROUND®
ADVISORS

Protect. Strengthen. Grow.®

JOB TITLE: ACCOUNT MANAGER I
DEPARTMENT: ACCOUNT MANAGEMENT
REPORTS TO: MANAGER, INSTITUTIONAL AND TRUST ADMINISTRATION
CLASSIFICATION: NON-EXEMPT
LOCATION: DALLAS, TEXAS

Position will be primarily responsible for the administration of endowment funds, various types of trusts, charitable gift annuities and donor-advised funds. The Account Manager will manage the accounts according to the governing instrument and pursuant to internal policies, procedures and statutory requirements as well as maintain a relationship with client partners, donors and beneficiaries.

WHO YOU ARE

As an Account Manager, you are a part of the account management team and have a passion for serving others while complying with governing documents. You are a self-directed, highly organized individual with the demonstrated ability to work in a fast-paced, flexible environment. You lean into new technology to maximize efficiency. Being a master multi-tasker, you can manage multiple clients and assignments simultaneously. Strong listening, written and verbal communication skills are just a few of your core strengths. Also, you are open-minded, inquisitive and fluid in adapting to and embracing change, making you the ideal collaborative team player. Utilizing your problem-solving and analytical skills you quickly formulate solutions with little supervision. To you, the details matter.

You are someone who owns your personal development and is proactive about your growth with an optimistic mindset. You have a commitment to exceeding both departmental and organizational goals. Instead of merely completing a task, you are about challenging the status quo and offer insight on ways to improve the client experience as well as internal processes. It can get busy around here, and when the going gets tough, you prioritize, work with your team and get your responsibilities completed. Promptness in response to clients is one of your top objectives.

Essential duties and responsibilities
YOU ARE EXCELLENT AT:

- Ongoing oversight and management of accounts in accordance with terms of the governing instrument and in a manner consistent with fiduciary principles
- Providing a high level of service as first point of contact with clients regarding day to day and operational matters
- Owning the client experience in all interactions including timely response and detailed follow through
- Monitoring daily cash balances and account activity as well manage cash additions and distributions
- Consulting with investment officers regarding the management of client portfolios
- Handling operational account related activities, including administrative reviews and account acceptance, opening and closing
- Assisting in the client onboarding process by collecting and organizing incoming client information and documents
- Collaborating within and across teams to analyze and resolve client issues
- Developing effective solutions for clients by collaborating with subject matter experts and other areas outside of your responsibility
- Effectively communicating solutions to clients

- Delivering results that routinely exceed requirements and expectations with minimal guidance
- Contributing to team goals and actively question decisions to elevate team performance
- Executing job duties following policies, standards, and/or procedures with target turnaround times and quality levels; bring awareness to management any constraints or concerns
- Preparing and assisting with tax returns, financial calculations, income projections, presentation materials and audits as necessary
- Assisting with team and company-wide projects and initiatives
- Assuming responsibility for related duties as required and assigned

Competencies and qualifications

YOU HAVE:

- Bachelor's degree in accounting, finance or business
- 0-1 years of experience in trust administration, endowment administration, or other relevant experience
- Ability to manage all account types and answer basic client questions with manager/team consultation and training
- Ability to learn from senior team members/manager to serve clients effectively and demonstrate team cohesion
- Willingness and ability to learn processes and procedures regarding account management from senior team members/manage
- Advanced knowledge of Microsoft Office Suite (Excel, Word, Outlook) and the ability to learn and utilize internal systems
- Previous experience with trust accounting systems
- Working knowledge of customer relationship management (CRM) systems, SalesForce experience is a plus
- Ability to maintain a high degree of ethical standards and complete confidentiality
- Exceptional and confident communicator and listener
- General knowledge of investments, including pooled funds, portfolio models and asset allocation is helpful
- Excellent verbal, written and interpersonal communication skills

HighGround has a professional, open office environment

ACCOUNT MANAGER WORKING CONDITIONS:

- Routinely uses standard office equipment such as computers, phones, multi-functional copiers and filing cabinets
- Usually sits to complete job functions, but may walk or stand for brief periods of time (access to sit-to-stand desks for optimal flexibility is provided)
- Must be able to lift up to 5 pounds
- Is required to have close vision, distance vision and the ability to adjust focus
- Is required to have the ability to lift files, open filing cabinets and bending or standing on a stool as necessary
- Is required to work onsite as scheduled with the potential to qualify to work from home two days a week and has little to no expected travel

The above statements are intended to describe the general nature and level of work being performed by the person(s) assigned to this job. They are not intended to be an exhaustive list of all duties, responsibilities and skills required of personnel so classified. Employees holding this position will be required to perform any other duties as requested by management, from time to time in its sole discretion. This updated job description supersedes prior descriptions for the same position. Management reserves the right to add or change duties at any time.

WHO WE ARE

Our vision is to Protect, Strengthen and Grow our nonprofit clients and charitably minded families. We believe there is no pursuit more important than this; because we believe the work we do, now and in the future, will not only shape our lives but will empower the many organizations that truly transform lives. This vision forms an authentic pathway to our mission—to be an innovative and vigilant caretaker of the funds and assets entrusted to us by the nonprofits and generous individuals we serve through effective asset management, gift planning strategies and account support services. It is the outcome we work towards together—to have a greater impact on the world and individual lives. We hope you will decide to join us on this incredible journey.

HighGround is committed to our brand promise and our core values. As such, we expect that you will strive to keep our clients at the center of everything you do, be honest, always remain professional, exhibit humility and think outside of the box as our founders did, who were pioneering and visionary when our journey began in 1930.

HighGround offers a comprehensive benefits package that includes a medical, dental, disability insurance, retirement plan and more, but don't take our word for it, have a look at what other HighGrounders are saying and learn more about our benefits here https://www.highgroundadvisors.org/careers.

If you are interested in becoming a part of the HighGround team, please email your resume and cover letter to HR@highgroundadvisors.org.