

Position Title: Client Services Coordinator		Position Duration: Permanent, Full-time
Org Unit: Operations/Capital Activation/Integrated Capital Operations		Reports to: TBD
Employment Status: W2	Starting Salary: \$55,000 - \$65,500	FLSA Status: Exempt

Introduction

[Impact Charitable](#) is a Denver-based nonprofit 501(c)3 organization that exists to help close the gaps between the sources of impact-first capital and communities, ventures and funds who have traditionally faced systemic barriers to accessing critical financial resources. We envision a world in which change makers can thrive by having access to the funding needed to fulfill their visions and solve systemic problems.

Impact Charitable unites catalytic philanthropists with community partners, financial institutions, foundations, social enterprises, and governmental bodies. As an Impact Capital Catalyst, Impact Charitable unlocks and accelerates capital that sparks positive change. We move more money, in more ways, to more people and places. Our work includes Direct Cash and Economic Mobility programs and Impact-First Investing.

We also work through Donor Advised Funds (DAFs): A donor advised fund is a charitable account that a 501c3 nonprofit sponsoring organization has legal control over while the donor retains the ability to advise/direct how those funds are deployed for charitable purposes (grants, impact investments). At Impact Charitable, most DAFs are formed for the purposes of making impact-first investments into ventures, projects or impact investment funds.

Position Summary

The Client Services Coordinator supports the full life cycle of Impact Charitable's integrated capital fund management from Capital Activation to Integrated Capital Operations by supporting outreach efforts, providing administrative coordination, direct support to clients

and partners, and account and finance administration. They may collaborate with the Direct Cash Assistance team as needed. This role will be responsible for building and maintaining exceptional internal and external relationships as well as keeping projects on a path to success.

Essential Duties

- **Provide heartfelt support and communication to Impact Charitable partners, colleagues, and clients at all investment levels**
- **Assist with documentation and files related to client accounts and support for answering inquiries**
 - Maintain/input records of Impact Charitable's contacts, relationships, CRM and business pipelines
 - Includes collection and some processing of contributions
- **Work with partners and team members to deliver on client requests**
- **Work on special projects as assigned by the Director of Operations and Director of Capital Activation**
- **Maintain electronic client files and accounts**
- **DAF and Expenditure Responsibility Grant processing**
 - Grant management and financial reporting of grant awards
 - Process and file grant requests
 - Coordinate intake of grant applications and initiate proper workflow
- **Project Coordination**
 - May include yearly impact measurement and management maintenance and reporting, special communications projects, and organization events
- **DAF (Donor Advised Fund) relationship management**
 - Respond to DAF inquiries in a timely manner
 - Set up new DAFs following established workflow and coordinating with finance department
 - Process contributions and deliver tax receipts/acknowledgments
 - Assist Advisors as needed with DAF service issues and questions
 - Recognize opportunities to help DAF Advisors get the most impact out of their DAF and communicate and initiate workflow with Integrated Capital or Direct Cash
- **Support Impact Charitable's annual nonprofit audit and IRS 990 reporting**

Key Competencies

- Understanding of and commitment to the mission and values of Impact Charitable; embraces inclusion and belonging in work style and personal interactions
- Understanding of confidentiality, ability to work independently and well on a team, strong communication skills, organized, positive and curious attitude, attentive to details.
- Comfort working in an entrepreneurial environment, learning new skills and developing efficient processes
- Collaborative and unafraid to ask clarifying questions to ensure the highest quality work is delivered
- Strong follow-through and follow-up skills to monitor progress and meet deliverables
- Experience with various online operating systems, software products and filing protocol
- Demonstrated skills related to project management, prioritization, and meeting deadlines
- Knowledge of DAF management, Impact Investing processes and accounting is a plus.
- Contributes to building a positive team environment; gives and welcomes feedback; shows desire to learn and grow, both personally and professionally through this work.

Work Environment

- Denver / Hybrid
- There is no expectation or required travel for this position with the exception of the regular in-person gathering of all Impact Charitable staff in Denver.

Benefits Include

- Medical/Health Stipend
- 401k
 - Traditional or Roth contributions
 - Employer vested 100% match of up to 3% of salary
- Paid Time Off
- Paid parental leave
- Remote work