

Position: Client Associate

Reports to: Director of Grantmaking

Status: Full-Time (40 hrs./wk.)

Location: Bainbridge Island, WA/hybrid

Salary: \$60,000 - \$70,000

Starting Date: Open



About Sound Philanthropy

Sound Philanthropy is a woman-owned philanthropic advisory group dedicated to helping clients grow as thoughtful, intentional funders bringing positive change to the world. Our vision is to uplift humanity through compassionate giving. We make this happen by developing unique pathways for our clients, and curating experiences of personal satisfaction, joy, and connection.

Collectively bringing more than 50 years of philanthropy and nonprofit experience to our client relationships, we work with foundations, individual philanthropists, couples, and multi-generational families, helping them to develop and operationalize giving plans, to grow through customized learning experiences, and to discover and cultivate meaningful partnerships with nonprofits, community leaders, other philanthropists, and professional advisors.

Job Overview

Sound Philanthropy seeks a full-time Client Associate to join our growing team. Approximately 80% of the Associate's time is spent managing a portfolio of clients, in partnership with our leadership team. The Associate plays a key role in supporting philanthropic clients by providing general project management support, broad issue area research, creating written materials, and the general administration required to make for seamless client engagements. Approximately 20% of the Associate's time is spent on general administrative support for the firm.

This position presents an exciting opportunity for an early-mid career candidate who is interested in the field of philanthropy and philanthropic advising. The most successful candidate will have strong verbal and written communication skills and possess the ability to complete complex tasks and projects with accuracy and composure. They are comfortable in a fast-paced, start-up environment and demonstrate this comfort by taking the initiative, working autonomously, and showing up with ideas and solutions to better serve our clients. They appreciate our firm's high-touch service culture, continuous learning, joy, positivity, and open-mindedness. This position is well-suited for a dynamic self-starter who possesses a desire to learn and contribute to the field of philanthropy and social change.

This role is based in Bainbridge Island, WA, and requires 2-3 days per week in-office at our Bainbridge headquarters. Additional in-person requirements include client meetings, primarily in the greater Seattle area.

Duties and Responsibilities

The Client Associate supports our leadership team in providing thought partnership and hands-on support on a portfolio of Ultra High Net Worth (UHNW) philanthropic clients. Under the supervision of the Director of Grantmaking, this position includes the following responsibilities:

Client Portfolio Management

- Support the leadership team in mapping out a concrete, actionable annual calendar and specific project plan for strategies and deliverables
- Work closely with the leadership team to implement philanthropic strategies and projects for multiple clients
- Develop clear, compelling, and professional materials for client and business development purposes, including correspondence, presentations, reports, and summaries
- Serve as the point person on moving action steps forward using Asana, providing reminders to Sound Philanthropy leadership and clients, when needed
- Produce meeting agendas and take comprehensive notes during meetings to ensure strategies and ideas are captured and can move forward; summarize meetings as requested
- Conduct research, landscape scans, and analysis of issues, grantmaking strategies, and organizations

General Administration

- Manage schedules for the leadership team, including meetings with clients, contractors, and other external stakeholders as well as outside professional commitments
- Support maintenance and continued integration of Salesforce into Sound Philanthropy operations and client services
- Serve as business development coordinator, working closely with the team to implement growth strategies and marketing plans, and develop presentations, reference materials, and other outreach documents as needed
- Update and maintain website content (Sound Philanthropy plus one client)
- Maintain sensitive firm and client materials for archival use

Qualifications

- Bachelor's degree preferred from an accredited college or university
- At least three years of experience in the social sector (*philanthropic, nonprofit, or impact investing fields*)
- Experience working with Ultra High Net Worth (*UHNW*) individuals and families
- Experience working in diverse communities and across social, racial, economic, and cultural differences

Skills and Experience

- Strong communication skills with the ability to convey ideas in a clear, compelling, and concise manner, verbally, and most importantly, in writing
- Demonstrated project management, capable of leading multiple work streams toward deadlines and juggling changing priorities
- Highly proficient in using Microsoft Office (especially Excel and PowerPoint)
- Strong analytical skills to develop accurate assessments of quantitative/qualitative data
- Experience with Salesforce and Asana preferred
- Demonstrated ability to build strong relationships that elicit trust
- Demonstrated ability to train others effectively
- Knowledge of federal, state, and local laws and regulations related to nonprofits and foundations

Attributes

Sound Philanthropy is a small, intimate environment in the start-up phase. Shared values are very important to the culture and success of our team. The following personal attributes are crucial to being successful at our firm:

- Believes in a client-centric approach, seeking to understand each client's values, objectives, and expectations
- Is an empathetic communicator, able to align their style to the sensibilities and language of the target audience
- Commits to accuracy and a keen eye for details
- Is a natural self-starter with the ability to work autonomously and with teams in person and virtual settings
- Is generally positive, optimistic and can adapt to an ever-changing environment
- Values learning and has a strong sense of curiosity about people and the world
- Has a high degree of integrity: it is crucially important that team members build and maintain trust—internally with colleagues and externally with partners and clients
- Is collaborative yet independent: someone who is collaborative and has experience flexibly supporting and leading teams, while also being able to work independently and be resourceful and accountable

Compensation and Benefits

This is a full-time, 40 hours per week, position with a base salary of \$60,000-\$70,000 per year. Sound Philanthropy provides employees with four weeks (20 days) of paid time off (PTO) to use for vacation, illness or injury, and personal business, combining traditional vacation and sick leave plans into one flexible, paid-time-off policy. In addition, Sound Philanthropy offers 10 paid days off for Company Holidays: an employee's choice floating holiday/birthday, New Year's Day, Martin

Luther King Jr. Day, President's Day, Memorial Day, Juneteenth, Independence Day (July 4), Labor Day, Thanksgiving Day, and Christmas Day.

We also offer an employee healthcare and dental plan covering 100% of employee premiums and an employer-match contribution to a 401k retirement plan. Other benefits include employer-paid professional development opportunities and a monthly transportation stipend.

Application Instructions

To apply, please submit a resume and a one-page cover letter to info@soundphilanthropy.com with "**Client Associate**" in the subject line.

The cover letter should address why you believe you'd excel at this work and why you're interested in working for Sound Philanthropy.

While Sound Philanthropy is open to individuals from various locations applying to join our team, please note that we are unable to pay for relocation expenses, and all applicants must already be legally eligible to work in the United States at the time of application to be considered for this position. We will review applications as they are received and look forward to hearing from you. Sound Philanthropy is a woman-owned Equal Opportunity Employer committed to a diverse workforce. LGBTQ+ and people of color are strongly encouraged to apply.