

Relationship Manager

Salary: £26,000 - £30,000 per annum dependent on skills and experience
Role: Full time, permanent
Location: Marylebone, London, W1 (On-site, 3 to 4 days in office and 1 to 2 days WFH)
Reporting to: Senior Relationship Manager

We are looking for two Relationship Managers to join our team in order to help manage various diverse and exciting accounts within Prism the Gift Fund. In this role, you will personally manage and administer both a portfolio of HNW donors and their giving as well as several Collective Funds accounts.

The successful candidates will have excellent numeracy and administration skills and be a strong communicator. This is a fantastic opportunity for someone looking to work in a fast paced, entrepreneurial and dynamic charity where they can play a key part in increasing the flow of funds into the charitable sector and see the impact of the work they do.

The Organisation:

Prism the Gift Fund (Prism) increases giving to charity by offering a personal service to those donating large sums of money. We are a registered charity working with high-net-worth individuals, foundations, and groups of donors to administer their charitable giving. Our growing team is a talented team of exceptional colleagues who are professional, dynamic and hard working. Prism offers two key services:

- **Donor Advised Fund (DAF) services** to HNW / UHNW individuals & families who channel their national and international philanthropy through Prism as a time, cost, and tax effective alternative to one's own grant making foundation.
- **Collective Fund services (CF)**- charitable, finance, and governance infrastructure - to groups who want to create brands or projects of a charitable nature under the auspices of Prism. The Collective enters into a relationship with Prism, benefiting from our charitable expertise and where we provide the administration, due diligence and disbursement of the funds raised in their name.

Responsibilities:

- Managing key collective fund and donor advised fund clients for Prism;
- Administering clients' finances, including but not limited to managing book-keeping, reconciliation, cashflow, banking, making payments, and providing donation summaries and statements;
- Day to day client liaison and management;
- Ensuring prompt, clear, and compelling communications with clients;
- Conducting due diligence to ensure all clients' activities abide by the UK charitable law and the Charity Commission's regulations;
- Assisting in development of effective strategies to steward Donor Advised Fund (DAF) and Collective Fund (CF) clients;
- Vetting and recording of new payees, contractors and grant recipients;
- Monitoring and recording donations into clients' funds;
- Working closely with the processing and compliance team to ensure a high level of service delivery;
- Working with the rest of the team to help grow our DAF and CF client base;
- Monitoring and assessing project reports from grantees and clients;
- Dealing with any other third-party service providers as and when is necessary;

- Maintenance of office systems including answering the telephone and re-directing calls, filing, meeting and greeting clients.
- Assist with writing bi-monthly newsletters to the Trustees.

The Candidate:

This is a fantastic opportunity for a detail-oriented person who has strong inter-personal and excellent administrative skills. We are looking for someone talented and engaging, with a positive attitude to work who can integrate quickly within the rest of the team and work closely with them to ensure that we are delivering the most efficient and high-quality service to our clients. You will have 1-2 years' experience in a professional working environment, be highly organised, conscientious and process driven, with a proven ability to work well within a changing regulatory framework to ensure client compliance with charitable law.

- A proven strong communicator;
- A good understanding of the level of service required by HNW individuals in the private sector and a passion for delivering exceptional donor stewardship;
- Have 1-2 years' experience in similar role or in a professional working environment;
- You will be a confident speaker both on the phone and at events and will relish the opportunity to promote Prism and communicate with ease the technical details of what we do;
- Comfortable working with confidential or sensitive data with knowledge of how to communicate and store information safely;
- Focused with meticulous attention to detail;
- Extremely organised with the ability to work under pressure, use initiative and manage multiple priorities to meet deadlines;
- Strong administrative skills and comfortable handling administration for several diverse accounts
- Team player with the ability to work well with the rest of the team in order to develop, implement, and monitor effective processes for collective fund clients;
- Excellent computer skills, being proficient in Microsoft Office and other software tools for managing a variety of internal processes;
- Self-motivated, proactive and solution driven in approach;

If you are interested in this opportunity, please send a CV and covering letter to Prism HR team via people@prismthegiftfund.co.uk

Closing & Interview Date

- **All applications should be received by 29th November to be considered**
- **First stage interviews will be held on 6th December 2023**
- **Final Stage interviews will be held week commencing 11th December 2023**

Please provide evidence of your ability to match the criteria outlined in the role competencies and where relevant, ensure your letter includes details of your latest salary, salary expectations and notice period.

Prism The Gift Fund is an 'Open to All' employer and welcomes everyone to the team. We are committed to being an equal opportunities employer, all applicants will be considered for employment without attention to ethnicity, religion, sexual orientation, gender identity, family or parental status, national origin, veteran, neurodiversity status or disability status.