

Account Manager Donor Advised Fund

Role Description and Recruitment Pack



Contents

Contents.....	2
Role overview.....	3
Why this position is important to us.....	4
The impact you will have in this role.....	4
Welcome to Stewardship	4
Our vision, mission and values.....	4
Job detail.....	6
Main responsibilities.....	6
It's all about you... ..	8
Desired skills and experience	9
Working for Stewardship	10
How to apply	11

Role overview

Title: Account Manager, Donor Advised Fund

Hours: 35 hours per week

Contract: Permanent

Location: 1 Lamb's Passage, London, EC1Y 8AB

There is some flexibility to work remotely, although **you must be able to work in the office at least one day per week**, or as the organisation requires. **During Probation there will be a requirement to work in the office twice a week.**

Reports to: Head of Complex Giving

Salary: £33-£35k per annum

Closing Date: 9am Tuesday 30 June
Interviews week beginning 13th July

Why this position is important to us

We have a growing community of generous, dedicated donors, eager to increase in their generosity; it is our goal to rise to the challenge by partnering with them and facilitating their generosity with biblically grounded, practical guidance.

This is an exciting role supporting a specialist service that requires a high level of accuracy, responsiveness and care. The team manages a broad range of responsibilities, including customer service, account and relationship management, compliance checks, legal and investment-related activity. You will play a crucial role in enhancing customer satisfaction by providing Stewardship donors and partners with a seamless, impactful service that bring our mission to life.

Generosity should be joyful, and yet it can often feel burdensome because of the necessary administration that surrounds financial giving. By working hard to complete and streamline essential processes for our customers, you will be helping to release more joyful generosity in the UK Church and beyond.

The impact you will have in this role

In this role, you will support donors and the partners they give to through accurate account and relationship management, and effective problem solving. You will manage giving, support investment, legal and account activity, and ensure all work is carried out in line with our compliance and regulatory requirements. Through vital processes, checks and administration, you will serve generous Christian donors and the churches, mission workers and charities they support, helping to ensure their giving is handled responsibly, efficiently and in a way that enables confident, impactful generosity.

Welcome to Stewardship

Stewardship serves Christian donors, workers, charities and churches in the UK and beyond called to faithfully steward their personal, professional or ministry resources for God's glory.

Founded over a century ago by a small group of Christians who partnered to facilitate financial support for Christian ministries, today we help over 30,000 people experience the joy of generosity, giving more than £100 million each year in support of over 6,000 charities, 4,000 churches and 2,000 Christian workers.

Our vision, mission and values

Our vision is to a thriving Kingdom economy where God's people steward resources generously to advance the Gospel. We help Christians be the best stewards of the resources God gives them.

Our four core values underpin all the work we do at Stewardship:



To find out more about Stewardship, [please view our short video clip](#)

Job detail

Main responsibilities

To include, but not limited to:

Overview:

To work as part of our specialist service team, delivering a high quality, tax effective service to high-net-worth givers in the UK and those with more complex giving needs. You will develop giver relationships with a particular focus on those sharing our Christian faith. You will report to the Head of Complex Giving.

Main responsibilities:

Responsibilities and duties include, but will not be limited to:

- **Customer service** – delivering timely, high quality and professional customer service to our customers and the Partners they support from their account. This will include resolving issues quickly and efficiently and referral to our technical team, as appropriate. Modelling our values in every interaction with customers, ensuring their needs are met with outstanding service throughout their journey with Stewardship.
- **Account management** – the timely and accurate handling of requests from customers and the processing of their giving. This includes account opening, ongoing administration and helping to organise customers' charitable giving arrangements, as well as tracking the progress of enquiries and opportunities using Salesforce. This includes assisting the Investments team with any account management relating to investments, and improving productivity by refining processes where needed, demonstrating a high degree of knowledge of the Complex Giving service offering.
- **Relationship management** – proactive and high quality management of relationships for our customers, attending to their giving needs as appropriate and being mindful of the strategic aims of both the customers and the team. This will include helping guide customers through their philanthropy journey, making connections and signposting opportunities for interaction, giving and other Kingdom opportunities, as appropriate. Proactively identifying and pursuing opportunities to engage with customers, taking the lead or contributing meaningfully to relevant projects that support strategic goals and customer relationships.
- **Compliance** – Complete routine compliance checks in an accurate and timely manner to ensure that all communications and transactions are acceptable to our regulators and are in line with our own charitable objects. This includes managing post-grant processes, and liaising with UK and international partner charities to ensure accurate and timely reporting. Adhere to our policies regarding Gift Aid, anti-money laundering and fraud, safeguarding vulnerable donors and identifying higher risk transactions. Work collaboratively with team specialists and the wider

technical team to support service delivery and operational efficiency. Ensure complex giving requirements are accurately represented and contribute to maintaining consistent and compliant processes across all grant making activities.

- **Meeting targets** – contribute to income and growth targets through successful relationship building, account management and service delivery. Taking ownership of specific monthly KPI data, monitoring progress and contributing to the regular reporting presented to the Leadership Team.

Other duties as directed by your line manager or head of the team, which may include project work, as delegated.

It's all about you...

We recognise that to be great at your role, there are certain characteristics that are important and others that enable a good fit within our existing team and culture.

- You should be a proactive problem solver who uses initiative, thinks creatively and adapts well to change.
- You should be an effective communicator, with strong written and verbal communication skills.
- You will be a proactive and enthusiastic team member, comfortable working under pressure and to challenging deadlines when needed.
- You will be able to develop a rapport quickly with clients, adopting a friendly and confident approach with a wide range of client types.
- You will enjoy a varied role that combines administrative work with excellent customer service, delivered with speed, accuracy and attention to detail.
- You must enjoy working as part of a team, while taking personal responsibility for contributing to the team's overall success, supporting others and remaining flexible in your approach.
- You should have strong numeracy skills and be confident working with numbers, including a basic understanding of investment principles.
- You must have customer service experience and a passion for delivering a timely, professional and high-quality service.
- We work with U/HNW individuals and families, so experience of working with this group and a confident, professional manner would be an advantage.
- You will be a practising Christian and be able to clearly demonstrate a personal commitment to the mission, principles, values and practices contained in our Ethos Statement, along with enthusiasm for the Christian purposes of the organisation and a readiness to support its ethos.

Desired skills and experience

Skills and experience	Essential	Desirable
You have at least 5 GCSE's (or equivalent) at grade 4 or C or above, to include English and Maths.	✓	
You have outstanding administrative skills, with experience of working in an administratively heavy role, following strict processes and procedures.	✓	
You have excellent communication skills, both oral and written, and be able to communicate clearly and effectively in written correspondence. You'll have a talent for explaining things in a calm, reassuring, straightforward manner, with the ability to connect and collaborate with people of all ages, experience, and background.	✓	
You have passion for customer service, with previous experience of working in a customer-facing role.	✓	
You have a desire to solve problems and maximise efficiency for your team and your customers.	✓	
You have excellent time-management skills, being able to work well under pressure and prioritise tasks under rapidly changing circumstances.	✓	
You have strong IT skills, with a good working knowledge of all core Microsoft 365 applications.	✓	
You have an eye for detail and a passion for excellence in your work.	✓	
You have a flexible and resilient approach to work, with a confidence to handle shifting priorities in your daily tasks.	✓	
You are able to demonstrate the need for confidentiality and discretion.	✓	
You have a general understanding of the UK charity sector including compliance and legal aspects around Gift Aid, GDPR, anti-money laundering and safeguarding.		✓
You have experience of using Customer Relationship Management (CRM) tools.		✓
You understand motivations for Christian generosity and challenges that may be commonplace within the UK Church.		✓
You have the Right to Work in the UK (we do not offer sponsorship arrangements).	✓	
You will meet our Occupational Requirement to be a practising Christian as an active member of a local church and be able to clearly demonstrate a personal commitment to the mission, principles, values and practices contained in our Ethos Statement.	✓	

Working for Stewardship

Q. What are the usual working hours?

A. Stewardship's normal office hours are 9am to 5pm, Monday to Friday, but you may be required to work flexibly between 8am and 6pm in accordance with the needs of the organisation.

Q. How much Annual Leave do you offer?

A. All full-time employees receive 27 days Annual Leave, and 8 days bank holiday leave.

Q. What are the pension arrangements?

A. Stewardship offers a generous pension contribution; the equivalent of 10% of your gross annual salary into a group personal pension scheme (applicable after 3 months service).

A salary sacrifice scheme for personal contributions is also available.

Q. Is it possible to work from home?

A. Yes, we are happy to offer flexibility for this role but would expect you to be able to work in our London office for a minimum of 1 day per week, or as the organisation requires.

Q. What staff benefits do you offer?

A. Once probation has been passed, there are number of benefits available to staff:

- Subsidised exercise membership
- Hybrid and flexible working options
- Generous leave allowances
- Long service awards
- Participation in the Cycle to Work Scheme
- Death in Service benefit (4x annual salary)
- Option to join a Health Cash Plan
- Interest-free season ticket loan



How to apply



Occupational Requirement (OR)

As a result of our Christian ethos, this post is covered by an Occupational Requirement (OR) under Part 1 of Schedule 9 to the Equality Act 2010. The successful applicant will be expected to be a practising Christian and to clearly demonstrate a personal commitment to the mission, principles, values and practices contained in our Ethos Statement, by:

- Active membership of local church congregation.
- An understanding of the faith aspects of the work of Christian charities, including the preparedness to pray with colleagues, where appropriate.



Contact us

For any questions or to arrange an informal conversation about this role, please contact Joan Gray, our People, Culture & Place Administrator, on:

Telephone: 020 8502 5600 extension 307

Email: careers@stewardship.org.uk



How to apply for this position

You can apply online for this role at www.stewardship.org.uk/about-us/careers

Please remember to also upload a copy of your C.V. along with a covering letter that demonstrates what you would bring to this role, to Stewardship and how you fulfil the Occupational Requirement.