



**Catholic Community
FOUNDATION
OF MINNESOTA**

NOVEMBER 2022 / OPEN UNTIL FILLED

About the Catholic Community Foundation of Minnesota

The Catholic Community Foundation of Minnesota (CCF) partners with Catholic individuals, families, parishes, and institutions to create meaningful charitable giving strategies and steward their financial resources. CCF is a catalyst for strength and vitality in the Catholic community, granting \$18+M to Catholic and other causes annually.

Established in 1992, CCF helps Catholics know the joy of expressing faith through giving.

Our Mission

To support financially the spiritual, educational, and social needs of our Catholic community.

About the Position

Title

Administrative Assistant of Investments

Office Location

Saint Paul, MN / Hybrid

Reports to

Director of Professional Outreach and Investments

Job Type

Part Time, 20-24 hours/week

Position Description

The part-time Administrative Assistant of Investments works closely with the Director of Professional Outreach & Investments in all areas of CCF's investment assets, Investment Committee meetings, investment pool structures, and asset management relationships. The core focus includes maintaining updated information and support materials and keeping detailed records as it relates to investment positions, policies and procedures, and committee meetings.

The position is primarily responsible for day-to-day clerical support as it relates to all activities of the investment area and may provide additional backup in both Development and Finance.

Responsibilities

- Provide clerical support for the Director of Professional Outreach & Investments in all onboarding of new investments: subscription agreements and new documents, establishing key contacts from new manager in system, and confirming proper format of new managers with consultant, custodian, and finance team.
- Maintain updated contacts of investment manager key personnel and new manager usernames and passwords for all investment management firms in all pools. This includes the ability to retrieve, organize, and retain regular documents, statements, and filings from all managers for file retention and audit support.
- Work with the Investment Committee Chair and the Director of Professional Outreach & Investments to prepare both committee and board reports.
- Take and prepare minutes at quarterly Investment Committee meetings.
- Format and use US Bank's Pivot system to build and extract reports.
- Work with the Vice President of Finance and Administration and the Director of Professional Outreach & Investments to assist in cash management of all pools, including quarterly pool receipts and withdrawals reports and quarterly PowerPoint charts for board reports.
- Provide clerical support for all additional investments with managers and consultants and/or spreadsheet support as it relates to re-balancing pools or investment committee presentations.
- Assist in maintaining and checking the current list of excluded and screened securities.
- Assist with the sale and reconciliation of gifted donor securities.
- Provide data entry and marketing assistance to development efforts as it relates to professional advisor outreach and institutional relationships.
- Support CCF staff, as needed, regarding relationships with donors, Archdiocesan parishes, schools, agencies, and grantees.
- Other projects and duties, including providing backup for other team members as needed.

Required Education, Skills, Knowledge, and/or Abilities

- Bachelor's Degree.
- 2 years minimum experience in investments, finance, or similar role (nonprofit or foundation experience a plus).
- Good judgment with an aptitude to work with people, set priorities, analyze data, prepare conclusions, and handle multiple assignments with tight deadlines.
- A commitment to the mission of the Catholic Community Foundation.
- Demonstrated expertise in practical use of and leadership in technology and the ability to use such tools to inform and educate staff on matters related to investments.

- Exceptional interpersonal leadership, supervisory, and organizational skills.
- Excellent oral and written communication skills to effectively engage staff, volunteers, donors, and stakeholders in the Finance and Investment functions vital to CCF's success.
- Excellent Microsoft Excel skills and strong general Microsoft Office skills.
- Institutional investment experience a plus, but not required.

To Apply

Submit cover letter and resume to Michael Ricci at riccim@ccf-mn.org. The position will remain open until filled. All inquiries and applications will remain confidential.

The Catholic Community Foundation is an equal opportunity employer.