



Investment Coordinator

Trustees of Donations

The Trustees of Donations to the Protestant Episcopal Church (the “TOD”) manages over \$280 million of endowment assets for the Episcopal Diocese of Massachusetts and its congregations. Excluding investment income, the annual budget of the TOD is approximately \$1.8 million. At present, the Diocesan Investment Trust (the “DIT”) has 146 participants, including 130 parishes, 14 affiliated organizations, the Cathedral Church of St. Paul and the Diocese. In total there are over 900 separate accounts to be managed.

The TOD is currently searching for an Investment Coordinator to oversee all of the day-to-day activities of the DIT. The Investment Coordinator is the only employee of the TOD, reports to its President and manages TOD’s annual budget in dialogue with its Treasurer.

Key responsibilities include:

- Serving as the liaison between the TOD and DIT participants and coordinating the execution of and recordkeeping for all transactions related to DIT accounts, including additions, withdrawals, transfers, and reallocations
- Meeting with current and prospective DIT participants to provide information about available investment options and the TOD’s investment and ESG policies and practices
- Providing administrative support for the TOD and its committees and presenting DIT activity and results to the Trustees at their quarterly and annual meetings
- Providing background research and studies in support of the TOD initiatives and drafting and editing reports, proposals, policies, and letters on behalf of the TOD and its committees
- Monitors proxy voting transactions to ensure compliance with the TOD voting guidelines and periodically providing the TOD with proxy voting reports
- Performs internal audits of DIT activity and preparing quarterly and annual reports for the TOD’s outside auditor
- Negotiates contracts and agreements with the TOD’s investment managers and other service providers and monitors their compliance with the provisions of contracts and the terms of agreements
- Manages the TOD website and creates and updates content

The successful candidate will have an undergraduate degree and broad knowledge of securities, custodial operations, and investment accounting. In addition, you should be detail oriented with

excellent numerical abilities and have outstanding written and oral communication skills. Knowledge of the dynamics of non-profit and voluntary associations is a plus.

We offer a competitive salary and exceptional benefits package including:

- Health Insurance
- Dental Insurance
- Life Insurance
- Short and Long Term Disability Insurance
- Flexible Spending Account Plans
- 403(b) Retirement Plan with 10% Employer Contribution
- 4 Weeks' Vacation per Year
- 14 Paid Holidays

To apply: send a cover letter and resume to Charles Jordan, current TOD Investment Coordinator, at cjordan@diomass.org.