
JOB DESCRIPTION

Job Title: Private Client Manager - CADF

Grade: D

Department: CAF American Donor Fund

Main purpose of the job:

To become a trusted advisor to CAF American Donor Fund (CADF) clients and their advisors. Responsible for the day-to-day management of CADF clients ensuring clients receive an excellent service by managing their accounts in an efficient and professional manner.

To achieve a range of stretching KPIs, delivering outstanding client satisfaction and growing revenue and assets under management from the existing client base. Assisting with the prospect pipeline and ensuring new clients are setup quickly and smoothly.

Responsible to: Senior Manager, CAF American Donor Fund

Budgetary responsibilities: None

Responsible for (staff/jobs): None

Job Responsibilities

- Primary relationship manager for a portfolio of CADF clients – mainly high and ultra-high net worth individuals, with a small book of corporate clients
- Deliver high quality client service, both proactive and responsive, to ensure that clients are always highly satisfied with the service provided
- Assist clients with implementing their desired philanthropic strategies for charitable giving by using a consultative approach to understand the clients' intentions and ensure that proposed solutions meet clients' requirements
- Work with the Senior Manager to advise clients on donating complex assets and then guide clients through the process to ensure timely completion of complex deals
- Guide prospective and existing clients through the Donor Advised Gift process including advising on required donation amounts and other requirements to ensure the clients' goals are met
- Deal with enquiries from prospective new clients and their advisors
- Proactively develop relationships with high potential clients to grow receipt and fee income
- Meet with clients as part of a proactive contact strategy
- Lead on implementing client surveys and other methods of gathering feedback in order to inform improvements to the CADF product
- Coordinate and lead internal change projects to improve and streamline CADF processes
- Prepare grant payments for board approval in an accurate and timely manner

- Take investment requests from clients and ensure they are implemented in an accurate and timely manner
- Provide assistance to the Senior Manager with regards to management of high value and high profile clients
- Develop strong relationships with CAF teams, particularly compliance and finance, to ensure internal processes move quickly and reliably in order that clients receive an excellent service
- Attend networking events as required to grow awareness of CADF and meet new introducers
- Ensure effective use of CRM, including the development of proposals for improved functionality and reporting
- Develop and maintain relationships with introducers (primarily charities and professional advisors) to grow the CADF client base
- Achieve and exceed agreed KPIs
- Assist where required with important client related administrative tasks including issuing of receipts, quarterly statements and new charity validations
- Be the first point of contact in the Senior Manager's absence, dealing with enquiries where possible
- Support the Senior Manager at events/presentations where required

General responsibilities

- Promote CADF at every opportunity to encourage growth in client numbers and business referrers
- Maintain a full understanding of the principles and practice (both external and CAF) in relation to the operation of donor advised funds; in particular relating to charitable donations, investments and social investment
- Maintain awareness of, and adhere to, all relevant policies and procedures that fulfil our legal/regulatory requirements (e.g. Data protection, AML) and internal CAF policies (e.g. complaints and data standards)
- Proactively promote and increase the take up of the range of services that CAF offers to existing and prospective clients, both directly and via a range of introducers
- Continuing education through seminars, conferences and related training to promote skills growth and development
- Use CAF computerised systems, and other CAF approved working practices to maintain up-to-date and accurate records of client contacts and achievements
- Participate and/or coordinate on projects as required
- Be proactive in the suggestion and development of new work processes and procedures, assisting with the implementation of solutions where required to continually improve customer service
- Participate in the performance management system by:
 - Achieving personal and team goals as agreed with Line Manager
 - Giving and receiving feedback
 - Gathering evidence to support performance
 - Supporting less experienced colleagues with training and guidance as required

- Ensure confidentiality in all matters
- Carry out other duties as specified by the line manager

CAF Values and Behavioural Indicators

The CAF Values and Behavioural Indicators set out in a transparent and consistent manner the explanation of the performance expectations of all CAF People. Through the use of common language and common standard, it combines a set of behaviours with the required technical skills and knowledge needed to effectively perform in any given role in CAF. This is used for the assessment, management and development of performance of all our people across CAF

Please refer to the link: [CAF values and indicative behaviours](#) for the CAF Values and Behavioural Indicators.

Dated: December 2025

PERSON SPECIFICATION

Job title: Private Client Manager - CADF

Date: December 2025

Attributes	Essential ✓	Desirable ✓	How Evidenced *
Experience Proven track record of relationship managing a portfolio of U/HNW clients/donors Experienced and confident at prospecting and networking with potential new clients Experience of working with and/or advising philanthropists	✓ ✓	✓	A/C A/C A/C
Qualifications Educated to A-Level or equivalent Educated to degree level or equivalent	✓	✓	A/E A/E
Specialist skills/ability/knowledge Ability to build and maintain relationships Computer literate Knowledge of donor advised funds and the voluntary sector Ability to manage time efficiently and prioritise a demanding workload Ability to display working understanding of financial industry and regulatory requirements including Charity Commission guidance, Charities Act, Trustee Act, KYC, AML	✓ ✓ ✓ ✓	✓	A/C/T A/C/T A/C/T A/C/T A/C/T
Communication Excellent verbal and written communications, proficient in English language Competent in communicating with all levels of staff / team player Competent in dealing with complex queries and complaints Excellent presentation skills to both small and large groups	✓ ✓ ✓	✓	A/C/T A/C/T A/C/T A/C/T
Personal qualities Strong communication and negotiation skills Commercially astute Open to new ideas and challenges Positive, outgoing and confident Self motivated, committed and ambitious Personal drive to exceed targets Ability to work autonomously with little day to day supervision	✓ ✓ ✓ ✓ ✓ ✓ ✓		A/C A/C A/C A/C A/C A/C A/C
Special conditions Additional hours as required Willingness to travel throughout the UK, with the potential for occasional overseas travel	✓ ✓		C C

Prior to Appointment All posts: <ul style="list-style-type: none"> • Credit check • Dow Jones check • Basic DBS Check • Employment references • Medical clearance • Right to Work in the UK 	✓ ✓ ✓ ✓ ✓ ✓		R/E
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***Key:**

R = References, E = Evidence/certificates, A = Application, C = Competency interview, T = Testing/assessment