



CSAC Finance Corporation

Position Description CLIENT SERVICES ASSOCIATE

Background

The CSAC Finance Corporation's Mission is to provide a broad array of finance, investment, insurance, purchasing, and health benefit services to support California counties and related public agencies. Since its inception, the CSAC Finance Corporation has grown to be the premier provider of a variety of cost-saving programs and services to counties and other local governments throughout California. The Investment Trust of California (CalTRUST) is a joint powers authority that provides investment alternatives for local government agencies in California. CalTRUST is administered by the CSAC Finance Corporation.

Job Description

The CSAC Finance Corporation seeks a Client Service Associate who will working closely with current CalTRUST participants and providing outreach/education to current and prospective participants in order to increase participation in the program. This position will also provide marketing support to other CSAC Finance Corporation programs. This is a full-time position and requires frequent travel.

Job Duties

- Establishes, maintains, and enhances the relationship between CalTRUST and its participants.
- Develops, tracks and reports key performance indicators.
- Coordinates and conducts education and outreach programs.
- Assists in identifying new growth areas.
- Assists in coordination of CalTRUST newsletter and other written program materials.
- Identifies proper decision makers in target agencies.
- Travels throughout California to meet with current and potential CalTRUST and other program participants and county officials.

Knowledge & Skills Required

- Cash management and investment practices for local government entities;
- Relationship management: relationship building skills, network development;
- Understanding of investment and portfolio management;
- Knowledge of Federal, state, and local government organizations;
- Excellent communication and interpersonal skills;
- Writing and speaking clearly and concisely;
- Ability to analyze and research complex issues;
- Ability to explain complex information clearly and simply;
- Reading, comprehending, and analyzing financial statements; and
- Confidence and presentation skills.

Minimum Qualifications

Bachelor's Degree in business, marketing, finance, government or related field and five years of professional experience in public finance or banking; or, an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

Salary & Benefits

Salary commensurate with experience. The CSAC Finance Corporation offers a comprehensive benefits package including full medical, dental, and vision coverage for the employee and his/her dependents, life insurance benefits, and participation in a defined benefit retirement program.

How To Apply

Application deadline is February 1, 2018. Submit resume, cover letter, and salary history to Laura Labanieh, Director of Operations, laura@csacfc.org.