

Donor Services Investment Analyst

ABOUT BROOKLYN ORG

Brooklyn Org is a champion for Brooklyn. We celebrate Brooklyn's brilliance and resilience, its incomparable culture and uncompromising grit – and we demand more for our communities.

Over our 15-year history, we have reimaged the role of philanthropy and provided immeasurable support to communities and nonprofit partners that are leading transformational change for Brooklyn. With a new model for community philanthropy, we are bringing together Brooklynites, Brooklyn backers, businesses, and broader believers in equity and justice to make Brooklyn a beacon for the world.

We are a platform for galvanizing giving. We are here to ensure that ideas are met with resources, challenges are met with solutions, and inequity is met with justice.

POSITION OVERVIEW

The Donor Services Investment Analyst reports to the Chief Operating and Financial Officer (COFO) and is responsible for the reconciliation and reporting of DAF investment activity. The Donor Services Investment Analyst plays a critical role in the financial oversight and strategic management of Brooklyn Org's Donor Advised Fund (DAF) investments. The Analyst will work closely with the Donor Services team and serve as a key liaison with the finance department to ensure accurate and timely investment reconciliation.

In addition, the Donor Services Investment Analyst provides comprehensive financial support across the organization, working in close coordination with the Senior Accountant to ensure the accuracy and completeness of all financial reporting. This role also manages relationships with investment managers, supports audit and compliance processes, and delivers financial insights that inform organizational strategy, planning, and donor stewardship.

This is a full-time, exempt position.

RESPONSIBILITIES

- **Investment Reconciliation:** Lead the reconciliation of DAF investment activity, ensuring accuracy, completeness, and alignment with donor intent.
- **Donor Services Collaboration:** Partner with the Donor Services team to support donor inquiries, customized reporting needs, and complex gift transactions.
- **Financial Planning & Analysis:** Provide financial planning and analysis to support budgeting, forecasting, and long-term strategic planning.
- **Investment Oversight:** Monitor fund performance and activity, ensuring compliance with internal controls, organizational policies, and donor intent.

- Review all donor agreements, gift structures, and fund management practices comply with IRS regulations, DAF policies, and the foundation's guidelines.
- Vendor Management: Serve as a key point of contact for investment custodians and third-party vendors, maintaining effective working relationships.
- Financial Reporting: Prepare and deliver timely monthly, quarterly, and annual reports with a focus on DAF investments and related financial metrics.
- Assist in developing the annual budget at department levels.
- Leverage modeling to evaluate and prioritize new strategic options
- Audit Support: Assist in the preparation and coordination of audit documentation, with a focus on investment reconciliations and vendor reviews.
- Insights & Process Improvement: Analyze financial trends and variances; identify opportunities for improvement and implement enhanced processes.
- Executive Communication: Create and present dashboards and reports to senior leadership, highlighting key insights and decision-making support.
- Strategic Projects: Contribute to cross-functional initiatives to strengthen financial operations, donor stewardship, and organizational impact.
- Other duties as assigned

REQUIRED SKILLS, KNOWLEDGE, AND QUALIFICATIONS

- Bachelor's degree in Finance, Accounting, Economics, or a related field.
- Minimum of 5 years of experience in finance or accounting; experience in nonprofit, foundations, or investment-related environments strongly preferred.
- Familiarity with CommunitySuite (Foundant Technologies) is a plus.
- In-depth understanding of financial reporting, investment reconciliation, and audit processes.
- Advanced proficiency in Microsoft Excel; strong skills in PowerPoint and Word. Experience with CRM or donor management systems is a plus.
- Exceptional written and verbal communication skills, with the ability to clearly convey complex financial information.
- Highly organized, detail-oriented, and able to manage multiple priorities in a fast-paced, deadline-driven environment.
- Proven ability to collaborate across departments and influence stakeholders through data-driven insights and strategic recommendations.

ADDITIONAL INFORMATION

Currently full-time employees are expected to work in the BKO office located in Downtown Brooklyn Monday through Thursday with occasional events on Friday.

EQUAL EMPLOYMENT OPPORTUNITY

Brooklyn Org is an equal opportunity employer. The Organization does not engage in or tolerate discrimination on the basis of race, color, gender identity, gender expression, religion, age, sexual orientation, national or ethnic origin, disability, marital status, military veteran status or any other protected group in the locations where we work.

COMPENSATION AND BENEFITS

Brooklyn Org has a competitive and exhaustive benefits and leave plan and the salary range for this position is \$95,000 – \$105,000 dependent on the successful candidate's background and experience.

HOW TO APPLY

Please send a cover letter and resume via email to search@brooklyn.org. Please write **Donor Services Investment Analyst** in the Subject Line of your email and mention where you found this job posting.