



Operations Processing Clerk

Join a team of professionals who are passionate about helping charitable clients build very personalized Donor Advised Funds (“DAFs”) to establish their family foundations. Canada Gives is a nationally registered charity, supporting major donors and their advisors across Canada. They are currently hiring an **Operations Processing Clerk** to join their head office team in Collingwood, ON.

The Role:

The **Operations Processing Clerk** will be responsible for a range of tasks that support the day-to-day operations of our public foundation and its’ 300+ DAF accounts.

Duties include but are not limited to:

- Processing charitable grant requests
- Working directly with charities on payment processing
- Assisting with DAF Account and/or investment account set-up
- Assisting with electronic filing, donor portal uploads, investment statement downloads
- Assisting with quarterly DAF account reporting
- Support client service and finance teams with project work, as needed
- Occasional assistance in general office administration duties

Qualifications

- 5+ years in detailed transaction processing role with a professional financial firm
- Experience with CRM/database management
- Strong attention to detail and problem-solving skills
- Familiarity with investment statements
- Proficiency in Microsoft Office, including Word, Excel, Outlook, and CRM
- Well-organized and able to manage time independently

Core Competencies

- Excellent skills working in multiple systems, including proprietary software
- Collaborative within the organization
- Flexibility required for growth in an entrepreneurial environment
- Philanthropic spirit

Candidates must be legally employable in Canada to be considered for employment.

Please note: This is an in-office position, and a remote work option will not be considered.



We are committed to fair and equitable recruiting practices. Canada Gives is an equal opportunity employer and also welcomes and encourages applications from people with disabilities. Accommodations are available on request for candidates taking part in all aspects of the selection process.

If you are interested and qualified for this position, kindly forward your resume to clientservices@canadagives.ca