

Analyst, Integrated Philanthropy**August 2025**

Washington, DC

WHO WE ARE

Fremont Group is a San Francisco-based family office serving multiple generations of the Bechtel family. As a team of over 150 professionals, we are committed to delivering long-term value through a comprehensive suite of family office services, including investment management, financial reporting and planning, tax compliance and planning, and philanthropic support.

We support our clients in navigating the complexities of their financial and personal lives by providing strategic advice and carefully curated external resources. Our centralized and integrated services are delivered with the highest level of professionalism and confidentiality.

We have assets under management across a broad array of asset classes, investing through external managers and directly. We consider ourselves “business investors” based on our operating orientation, commitment to partnership with external managers, and portfolio company founders and management teams to create superior value over the long term.

Our success has been based upon the values of excellence, partnership, courage, humility and doing what is right. Together, we operate with a unified purpose: to foster enduring relationships, steward capital responsibly, and help our clients and partners thrive across generations.

CULTURE OF LEARNING, INCLUSION AND OUTREACH

We believe that our firm is only as good as its people. Fremont fosters a welcoming and inclusive culture that values each individual’s unique ideas, perspectives, and backgrounds. We feel that everyone has ideas worth hearing and we have created a collaborative and collegial environment in which we are empowered to do our best work. We also invest heavily in our employees' ongoing education, career development, and their wholistic wellbeing. Employees at all levels and functions receive support to help them grow their technical, business, and leadership expertise relative to their functional area. As a relatively smaller organization, all employees can make a visible impact on the firm, be recognized, and grow their careers in meaningful ways.

Outreach and philanthropy are at the core of what we do and who we are as members of our community. Fremont encourages and celebrates the contributions of employees in the community. Through the Fremont Group Foundation (FGF), we offer various ways for employees to make an impact, including employee organized volunteer events, an annual fundraiser, and our Annual Giving Month, to name a few. We also offer generous volunteer time off (VTO), donation matching and service awards for employees who volunteer and/or serve on the governing board of an eligible organization.

WHY THIS ROLE IS IMPORTANT TO US

The Analyst, Integrated Philanthropy is a vital member of Fremont Group’s philanthropic advisory practice. Our families entrust us with helping them shape and advance their visions for impact, and this role ensures we deliver with excellence, care, and thoughtfulness. This is a unique and compelling opportunity to work closely and strategically with family clients and support family office activities and a diverse philanthropy portfolio at varying stages of development.

INTEGRATED PHILANTHROPY PRACTICE

Fremont Group's Integrated Philanthropy Practice manages 17 client foundations, provides professional advice, supports the clients' philanthropic vision, and helps them increase the impact of their personal and institutional giving. Fremont clients are philanthropy learners and leaders whose vision and path to achieving success take shape in different ways. The success of the Integrated Philanthropy practice relies heavily on a consultative, collaborative approach, meeting high standards and driving innovation and excellence. The Integrated Philanthropy Practice is led by the Director, Integrated Philanthropy, who oversees a team of five and contracted subject matter experts, advisors, and nonprofit attorneys.

The Integrated Philanthropy Practice is embedded within the Client Services function, a team of 22 who provides a range of services to family clients, including estate planning, human resources, financial services, tax planning, philanthropic advice and management, and more. Most team members have experience and expertise in law, estate and strategic planning, and wealth management. The team is collaborative and driven to provide exceptional client services by executing daily projects and transactions while providing insights and advice to meet client needs and interests. Excellent communication, attention to detail, accuracy, and service delivery drive everything accomplished within the Client Services team.

WHAT SUCCESS LOOKS LIKE ON THIS TEAM

- The success of the Integrated Philanthropy team depends on collaboration, accuracy, engagement, trust-building, and delivering best-in-class service.
- Success in this role means becoming a trusted partner to clients, supporting their philanthropic goals with care and precision.
- The Analyst should be able to synthesize research, facilitate client discussions, and support philanthropic strategies that are thoughtful and bespoke.
- They should also ensure seamless operations, maintaining accurate data and records, so clients feel confident in Fremont Group's ability to manage their philanthropy with excellence.

YOUR CONTRIBUTIONS

The success of the Integrated Philanthropy team at Fremont Group relies heavily on proactive collaboration, accuracy of work, overall engagement, building trust with clients and internal teams, and providing best-in-class service to clients. A successful Analyst will:

Client Advisory Support

- With the VP of Philanthropy, prepare materials for clients or client meetings, including reports, recommendations and agendas.
- Collaborate with the IP and CS teams to draft broader presentations, reports, and memos for assigned clients.
- Manage the creation of Foundation board dockets for assigned clients.
- Liaise closely with client teams to arrange meetings, site visits, or other activities. With VP of Philanthropy, track client touchpoints to facilitate larger conversations around client goals.

Philanthropic Program Support

- As requested, perform initial research, trend tracking, or outreach towards the development of a client's programmatic philanthropic strategy. Perform due diligence on potential new opportunities.
- When requested, meet with grantee and donee partners, philanthropic colleagues, and subject matter experts to support clients' programmatic goals, on behalf of the VP of Philanthropy and other IP team members.
- Respond to inquiries from grantees, nonprofits and potential partners in the philanthropic community. Evaluate and monitor grantee and donee activities, with an eye towards offering support and guidance.
- Contribute to research in the field and the growth and development of new philanthropic vehicles, in response to clients' expanding philanthropic portfolios.

Operations

- Work closely with VP of Grants Management, other analysts, and key internal teams to facilitate grants and donations for assigned clients.
- Utilize Salesforce to manage and maintain client philanthropic information.
- Grow and maintain database of grantee and donee partners, philanthropic opportunities, and client nonprofit leadership roles
- Ensure grantee documentation, financial information, payments, and other philanthropy-related communication are well organized and meet best practices standards. Maintain records, proposals, contracts, and deliverables for engagements as assigned.
- While maintaining efficient workflows, work with broader Fremont teams to continuously improve processes with a mindset of collaboration and growth.
- Contribute to documentation libraries across Integrated Philanthropy, Client Services, and Fremont as a whole.

Family Office Support

- Support the Client Services team in responding to daily, often high-volume, client requests on a wide range of philanthropic topics requiring exceptional responsiveness, thoughtfulness, and attention to detail.
- Help create and review monthly and quarterly client reports prepared in partnership with internal teams to identify areas of discussion prior to distribution to clients. Review of reports includes checking data integrity, spelling and grammar, and formatting consistency across the custom reports, and effectively communicating any edits or questions with internal partners.
- Draft communications and memos for senior members of the team as needed.
- Assist in the preparation of schedules and documents for client foundations and personal philanthropy. Track donation activity, interface with grantee and donee organizations, and prepare quarterly reports. When requested, provide giving projections.
- Ensure a productive and helpful flow of relevant information in and around many different client teams to facilitate client deliverables.
- Serve on committees, task forces, and leadership or Employee Resource Groups as appropriate and available, to further Fremont Group's vision and leadership model and your own personal professional development.

KEY PROFICIENCIES

1. **Knowledge of core philanthropic concepts** – experience conducting research and analysis on issues, grantmaking strategies, and organizations. Able to participate in the development and/or review of proposals. Familiarity with non-profit sector and strategic, ethical grantmaking and philanthropic practices.
2. **Experience in nonprofit, philanthropic, foundation, or family office settings** – with a track record of positive impact in highly collaborative environments, and a demonstrated understanding of philanthropic program strategy.
3. **Highly organized/Attention to detail** – ability to solve complex problems, triage competing priorities, and carry out assigned responsibilities in an organized manner. Exhibit skills to adapt well to a complex, demanding, and evolving work environment while acting as the ‘ultimate owner’ of work products requiring attention to detail.
4. **Proactive, self-starter and deadline-driven** – ability to work successfully and enthusiastically in a high-performing, demanding, and fast-paced work environment. Exhibit excellent judgement, understand the complexity of multiple stakeholders, and ability to work effectively under pressure and under tight time constraints.
5. **Effective communicator** – exhibit strong people skills evidenced in both verbal and written communications, as well as excellent listening skills. Brings a sense of curiosity, consistent follow-up, and prompt responses.
6. **Drive for optimization** – inclination towards process improvement, growth, and building consistent workflows. Ability to use judgement to look for enhancements, and confidence to provide or lead recommendations.
7. **Technical skills** – fluency with the MS Office Suite, including strong MS Excel skills, and Adobe products. Experience with Salesforce or other contact management (CRM) tools, emerging new technologies, as well as project management tools Asana and Confluence, a plus.

WHO YOU’LL WORK WITH

This position will be a valued member of Fremont Group’s six-person Integrated Philanthropy team, housed within a larger Client Services department. It will support senior team members with services related to Foundation grantmaking and personal giving, support philanthropic program development, manage key Foundation operations, craft reporting and analysis, offer nonprofit and partner support, and provide other client services. Currently, the team spans both San Francisco and Washington, D.C., with this position based in our Washington, D.C. office.

This role is joining at an exciting time for Fremont’s philanthropic advisory practice, which is both quickly evolving its best practice operations, and expanding its philanthropic offerings and tools to match our clients’ ambitious visions for impact in the world. This position reports to the VP of Philanthropy based in Washington, D.C.

COMPENSATION & BENEFITS

This is a full-time, exempt position. Fremont offers highly competitive compensation packages, commensurate with related work experience and education. The compensation range for this position is \$115,000 - \$135,000, plus an annual discretionary bonus.

Fremont also offers excellent benefits for eligible employees available on date of hire. Current benefits include but are not limited to: medical (PPO, HMO and HDHPs); dental and vision coverage; 401(k) with 5% employer match plus an annual employer contribution; life insurance; disability insurance; HSA contribution when enrolled in HDHP; Flexible Savings Account (FSA); dependent care account; transit/parking assistance; flexible time off/vacation (no caps); paid medical leave; 20 weeks of paid parental leave; a generous child care stipend for qualified families; infertility benefit; an employee assistance program (EAP) including access to financial advice, mental health services, and health advocacy services, and ongoing education assistance. In support of our organization's core values, Fremont offers paid time off to volunteer for nonprofit organizations as well as direct grants and matching grants for employee contributions to tax exempt organizations.

ADDITIONAL INFORMATION

- Employees must be available to work in person, Tuesday – Thursday, in our Washington, D.C. office

TO APPLY

Interested candidates are requested to submit a resume and cover letter to our Recruiting Team by Friday, October 3. Please direct any questions to PhilanthropyJobs@Fremontgroup.com.

Fremont Group is an Equal Opportunity Employer