

Philanthropic Advisor

POSITION DESCRIPTION

The philanthropic advisor is a member of the Development and Donor Services department, which cultivates and maintains relationships with the Foundation's donors. The philanthropic Advisor develops, facilitates, and markets lifetime gifts from existing and prospective donors. They provide counsel and advice to staff, donors, and allied professionals regarding various philanthropic tools, approaches, techniques, and trends. This role serves as a secondary liaison with attorneys, accountants, financial advisors, and other intermediaries and agents of wealth. The philanthropic advisor works with existing and new donors and intermediaries to secure new funds and gifts to the Foundation. This position helps to generate ideas and explore opportunities to achieve the strategic goals of the Foundation. This position works under the direct leadership of the senior philanthropic advisor and works collaboratively with the Foundation's staff, leadership, and volunteers. The philanthropic advisor is an exempt position.

ABOUT THE WINSTON-SALEM FOUNDATION

We are a nonprofit community foundation, comprised of over 1,650 funds, that assists people and organizations with their charitable giving, provides financial aid to college students, and makes Community Grants to nonprofit organizations in Forsyth County. We are the oldest foundation in North Carolina, and we are one of the oldest community foundations in the country. Since 2018, the Foundation has been on a journey to deepen its understanding of and commitment to racial equity as both a priority in our work in the community and as a hallmark of our organizational culture.

Our vision:

A generous and trusting community where everyone is thriving.

Our mission:

We inspire giving and link resources to action, strengthening Forsyth County—now and forever.

Our values:

- **Inclusion** – we practice and champion inclusion, honoring the strengths and experiences of all in our community.
- **Accountability** – we honor the intentions of our donors and partners and hold ourselves to the highest standards of ethics, service and stewardship.
- **Continuous Learning** – we are committed to learning and evolving with our community and our partners.

DESCRIPTION OF RESPONSIBILITIES

All staff work together to live out the Foundation's mission, values, and equity commitment. Each person actively participates in education sessions, work groups, and other formal and informal opportunities to learn about and operationalize our shared commitment to equity.

Asset Development

- Participate in the identification and cultivation of new and existing relationships to achieve the Foundation's resource development goals according to the Foundation's strategic plan
- Utilize interpersonal savvy and confidence to network, motivate, and skillfully craft giving strategies to benefit donors, advisors, nonprofit beneficiaries, and the Foundation
- Participate in the Foundation's development and cultivation of professional advisor relationships
- Support the Foundation's planned giving program by drafting and reviewing revocable trust agreements with donors and professional advisors
- Provide team support and stewardship for various constituent groups with an emphasis on existing donors, new donors, and professional advisors
- Respond to inquiries and follow up on requests from existing donors, prospective donors, and professional advisors
- Assist in the administrative process of establishing gift plans and new funds of all types by drafting fund agreements, revocable trust agreements, correspondence, and other necessary follow up
- In partnership with the Black Philanthropy Initiative and The Women's Fund of Winston-Salem, strategize ways to engage people of color and women in the charitable work of the Foundation
- Demonstrate the Foundation's commitment to accountability by honoring donor intent, furthering donors' charitable goals, and seeking to engage charitable partners to address the most pressing needs of the community
- Maintain accurate records for all contacts with donors, prospective donors, and professional advisors

Promotion of Philanthropy

- Develop strong relationships throughout the community with existing donors, prospective donors, and professional advisors to share knowledge of charitable giving strategies and techniques and promote the comparative benefits of charitable partnerships with the Foundation
- Represent and position the Foundation as an effective and impactful charitable partner through community presentations and engagement
- Participate in appropriate cultivation/education events and gatherings for donors, prospective donors, and professional advisors
- Collaborate with the vice president of development and donor services, the senior philanthropic advisor, and the Marketing and Communications team to develop collateral materials that highlight the Foundation's products and services as a charitable partner and knowledgeable community leader

- Maintain current knowledge of philanthropic trends, legislation, and planned giving techniques that impact the field of philanthropy in general and charitable funds in particular
- Participate in local, regional, and statewide groups to promote working with community foundations

Fund Administration

- Collaborate across teams to clarify and document gift plans
- Assist with fund questions, document changes, and future plans
- Oversee the documentation and execution of charitable plans and matured gifts to follow through on donor intent

Other Related Activities

- Manages a portfolio of donors
- Perform other duties as assigned

QUALIFICATIONS

- A background in financial planning or planned giving; customer service; and marketing experience is preferred – a legal or accounting background with concentration in the area of trust and estates would also be appropriate for this position.
- Proven track record in the field of philanthropy, demonstrating continuous growth
- Strong commitment to the Foundation's values
- Demonstrated experience working with a team toward a common purpose in the spirit of collaboration
- Commitment to and understanding of racial equity
- Ability to interact respectfully with people of diverse backgrounds, perspectives, and cultures
- Bachelor's degree required, post graduate degree preferred
- Chartered Advisor in Philanthropy® (CAP®) designation or willingness to obtain
- Commitment to continuous learning
- Strong interpersonal skills
- Strong organizational skills and demonstrated ability to manage and execute multiple projects and priorities
- Strong written and oral communication skills
- Attention to detail
- Understanding of a constituent management system and its importance of development work

HYBRID WORK SCHEDULE

The Foundation offers a hybrid schedule where most staff are expected to work in person at least two to three days per week. Some positions, such as the Philanthropic Advisor, are expected to be in person more frequently due to the nature of their responsibilities. The Philanthropic Advisor will be expected to be in-person a minimum of four days per week. Our offices are in downtown Winston-Salem.

SALARY AND BENEFITS

Salary range starts at \$85,000, commensurate with experience. Benefits include generous paid time off (PTO) and holidays. Health insurance, life insurance, dental insurance, short-term and long-term disability insurance, and parental leave begin the first of the month following 30 days of employment. Eligibility for the defined benefit retirement plan begins after one year of service. Other optional benefits include a flexible benefit plan, supplemental insurance with AFLAC, employee supplemental retirement plan, charitable match program and tuition and fee reimbursement.

The Winston-Salem Foundation is committed to building a staff that reflects the community served by the Foundation's mission and strategic priorities and we invite applicants that represent our diverse community.

To apply, please visit wsfoundation.org/careers.