



## **POSITION ANNOUNCEMENT**

Charitable Giving Advisor

### **COMMUNITY FOUNDATION OF GREATER DES MOINES**

For over 50 years, the Community Foundation of Greater Des Moines has improved quality of life for all by promoting charitable giving, connecting donors with causes they care about and providing leadership on important community issues. We're simply better together.

### **PURPOSE OF POSITION**

The Charitable Giving Advisor plays a vital role in the achievement of overall charitable giving goals. This position is responsible for managing Community Foundation's stewardship of an assigned portfolio of current fund holders, as well as building relationships with prospective fund holders and working alongside professional advisors (such as financial, tax and estate planners). Key strategies of the position include: proactively developing relationships with assigned individual and family fund holders to maximize the donor experience with the Community Foundation, assisting fund holders to achieve their charitable giving goals, proactively cultivating relationships with prospective fund holders and overall, deepening donor and professional advisor relationships, including Charitable Investment Partners.

### **CORE COMPETENCIES**

Accountability/Dependability | Relationship Building | Communications | Attention to Detail/Accuracy | Results Focus & Initiative | Discernment

### **QUALIFICATIONS**

A self-starter who enjoys working as part of a dynamic team; successfully cultivates new relationships; has ability to gain the confidence and respect of donors and professional advisors; mature judgment; high integrity; approachable and comfortable initiating conversations with donors and professional advisors; ability to understand complex issues; creative problem solver; critical thinker; strong written communication skills and the ability to work one-on-one with donors and professional advisors or make formal presentations to groups; the ability to listen and find connections between donor needs/interests and giving strategies; broad community and nonprofit knowledge; experience working with donors; well-organized; resourceful; motivated; ability to multi-task; excellent interpersonal and customer service skills; strong computer skills; willingness to seek ongoing training and/or professional certificate(s) to maintain and improve current skills and knowledge.

### **EDUCATION AND EXPERIENCE**

A bachelor's degree and a minimum of five years of experience in client services, gift planning, financial services or closely related professional experience preferred. Chartered Advisor of Philanthropy (CAP®) certification strongly preferred. Prior knowledge of and experience with charitable gift planning preferred. Proven ability to interact comfortably with a broad spectrum of donors, community leaders and professional advisors is required. Strong knowledge of the full range of deferred giving vehicles and

tax laws related to charitable giving and experience in major gift programs preferred. Must be able to manage multiple projects and tasks simultaneously and work both independently and in a team environment.

### **SALARY**

The Community Foundation is committed to pay equity and provides a comprehensive compensation package which includes annual salary and benefits benchmarking. Salary range will be shared with candidates prior to the interview process, or upon inquiry.

### **APPLICATION PROCESS**

Interested applicants should submit their resume, cover letter, salary requirements and three references to Chelsy Foy at [foy@desmoinesfoundation.org](mailto:foy@desmoinesfoundation.org). We encourage anyone considering the position to apply. This position will be filled when a qualified candidate is identified.

Don't meet every single requirement? At the Community Foundation we are dedicated to building a diverse, inclusive and authentic workplace, so if you're excited about this role but your past experience doesn't align perfectly with every qualification in the job posting, we encourage you to apply anyway. You may be just the right candidate.

The Employer is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the Employer will provide reasonable accommodations to qualified individuals with disabilities and encourages prospective employees and incumbents to discuss potential accommodations with the Employer.