



## Director of Gift Planning

The Community Foundation for Greater Buffalo (Foundation) is seeking to hire a Director of Gift Planning (“Director”) to focus on business development, specifically responsible for developing new and deepening relationships with professional advisors (PAs) and their clients. The Foundation has a network of over 700 relationships with local PAs (attorneys, accountants, financial/investment advisors, and life insurance advisors). Between 25 to 50 percent of new relationships are referred to the Foundation from that network. The Director leads and drives efforts for deepening and broadening that network including:

- Developing approaches to identify and proactively cultivate relationships with advisors including overseeing and staffing the Professional Advisor Council
- Service the needs of the PAs when appropriate, including researching, building, and maintaining a database of key PAs and their client referrals. Maintaining accurate records of contacts with and referrals from PAs
- Acting as key contact for all professional advisors where appropriate, including estates in settlement and outside financial advisors. Managing PA newsletter and correspondence
- Coordinating and presenting on various topics related to the Community Foundation, planned giving, and endowment building for professional advisors

Additionally, the Director is also responsible for developing and maintaining a prospect pipeline and cultivating relationships with prospective clients.

- Developing approaches to identify and proactively cultivate relationships with charitably inclined individuals and organizations
- The Director will assist team members in speaking to clients about planned gifts and preparing illustrations.
- **Manage:** Giving Strategies Analyst

This position requires proven relationship development skills and the ability to conceptualize, cultivate and implement prospective client’s philanthropic goals and charitable legacies. Additional requirements include: superior follow-up, sound organization skills, technical knowledge of planned giving, the ability to work effectively with clients and professional advisors, superior public speaking and presentation skills, strong interpersonal skills, the ability to be self-directed and the ability to achieve specific outcomes and goals.

### MINIMUM QUALIFICATIONS

- Minimum education: Bachelor’s degree. Preferred education: Advanced degree in related or complementary field, including J.D., M.B.A., C.P.A.
- Ten years or more experience in business and relationship development
- Experience in a service industry or with professional advisors preferred
- Technical knowledge of planned giving and investments
- Experience using a CRM database
- Proficient with Microsoft Office suite, including PowerPoint and Excel

## **ABOUT THE FOUNDATION:**

The Foundation is a public charity dedicated to helping clients/donors make the most of their generosity. Our mission is connecting people, ideas and resources to improve lives in Western New York. For 97 years the Foundation has managed endowment funds for individuals, families and organizations, and is currently home to over 800 named funds. The Foundation has a very clear vision: A vibrant and inclusive Greater Buffalo region with opportunity for all.

The Foundation is seeking a professional that is enthusiastic and dedicated to ensuring that the Foundation's community goals are met, within the following four priority areas:

- Improve educational achievement for students living in low-income households
- Increase racial/ethnic equity
- Enhance and leverage significant natural resources
- Strengthen the region as a center for architecture, arts & culture

For more detail about the Foundation's community goals see: <http://www.cfgb.org/invest-in-wny/>

## **APPLICATION PROCEDURE**

We're looking for top talent: people who want to use their abilities to make a lasting difference. If that's you, then please send a cover letter explaining your interest in this position and what you would bring to the Community Foundation for Greater Buffalo. Send cover letter and resume as a single Word or PDF document via email to: [Jobs@CFGb.org](mailto:Jobs@CFGb.org). No calls please.

Application deadline: Open until filled.

The Community Foundation for Greater Buffalo is an equal opportunity employer that is committed to valuing diversity and practicing inclusion.