

## JOB DESCRIPTION

**POSITION TITLE:** Philanthropic Officer, Professional Advisor Services

**DEPARTMENT:** Foundation

**REPORTS TO:** Chief Foundation Officer

**STATUS:** Full-time, Exempt

**PRINCIPAL FUNCTION:** As Jewish Atlanta continues to boom, the Atlanta Jewish Foundation (Foundation) intends to play a bold and creative role. The Foundation is part of Jewish Federation of Greater Atlanta. The Foundation manages over \$400 million in charitable assets, comprised of over 1000 funds in the Atlanta community. The Foundation is looking for a creative, motivated, flexible, detail-oriented, and proactive Philanthropic Officer to join our efforts as we expand the ways we engage with donors in the community.

You will work with a passionate team of Federation professionals to increase the impact of the organization's work here in Atlanta, in Israel and the world and help philanthropists give with more meaning in alignment with their Jewish values. You will collaborate with our donors to build strong relationships and provide unique engagement opportunities increasing donor satisfaction and delivering more impact to the community. As a trusted philanthropic partner, you will develop sustained relationships with donors and their families, providing consultation to donors and their professional advisors to retain and grow contributions through philanthropic vehicles to meet donors' needs. You will be responsible to lead, manage, develop and implement engagement strategies, stewardship programs and services for donors to deepen, maintain and grow relationships and ultimately fulfill strategic milestones for the Foundation.

### ESSENTIAL DUTIES AND RESPONSIBILITIES:

#### Professional Advisor strategy and engagement

- Build strategy and implementation plan for increasing our relationships and building a sales funnel with our professional advisors (estate attorneys, CPA's, wealth advisors, etc.) in Atlanta.
- Lead the strategy for Balser Symposium and Professional Advisors Leadership Institute PALI committee and oversee the corresponding events in collaboration with Community Foundation of Greater Atlanta and United Way our community partners.

#### Donor Prospecting

- Seek and pursue referrals from donors, professional advisors, and current and former board members for new donor prospects.
- Support the Chief Foundation Officer and Senior Philanthropic Officer with prospect cultivation and closing.

#### Understand and be able to Utilize Our Giving Vehicles

- Has a working knowledge of giving vehicles (Donor-Advised funds, legacy giving tools, etc.) to deepen relationships with professional advisors and donors.

- Work collaboratively with the Federation campaign and Community Planning and Impact team to strengthen an integrated approach to fundraising that includes both annual and legacy giving.

**Serve as a Philanthropic Advisor: Donor engagement, stewardship, and programmatic implementation**

- Build stewardship plans to maintain deep relationships with a portfolio of existing donors.
- Serve as a Philanthropic Advisor to provide creative solutions to help donors realize their vision for giving today and tomorrow.
- Build trust and facilitate Family Workshops on Multigenerational Philanthropy, helping each family member clarify their own philanthropic interests, and learn how to initiate discussions about where they would like to see family resources allocated and how they can participate.
- Create, implement, and maintain multiple education and engagement opportunities and programs, providing highly customized experiences.
- Proactively generate opportunities to share with donors and rapidly respond to donor requests for information; coordinating research on nonprofit organizations in a particular field of interest and connecting donors to resources within the Foundation to address their needs.
- Work with other Federation departments to connect their programmatic expertise to donor interests and ensure that these resources are available.

**Relationship management, CRM implementation and stewardship through Salesforce**

- Track and monitor relationships with donors, build profiles of donors and research donors' interests, giving patterns and philanthropic capabilities through use of Salesforce.
- Responsible for hitting metrics and continuing to enhance processes to measure success in delivering donor services and use the knowledge gathered to continually enhance the Foundation's donor engagement program.
- Implement and monitor systems to successfully manage stewardship and to adapt to trends and both the organization's and donors' changing needs.

**Marketing and communication**

- With the Marketing Department, create, update, and maintain collateral for professional advisors and donors.

**Represent Foundation at various events and community gatherings**

- Being present and visible at various events in the community, which is very important and a great way to build relationships with our partners.
- The Chief Foundation Officer, the Senior Philanthropic Officer, and Philanthropic Officers share responsibility for attending these events; many are outside of traditional business hours.

**Other duties as assigned. May require work outside of regular office hours for events.**

**QUALIFICATIONS:**

- Bachelor's degree required, Master's or advanced degree preferred, and 6+ years of experience in charitable giving, philanthropic planning and advising, planned giving, customer service, financial services, client services, and/or sales development.
- Demonstrated understanding and commitment to the Jewish or Atlanta community, strong interpersonal, leadership and organizational skills.

- Knowledge of computer and database utilization required. Experience in volunteer management and fundraising or sales strongly preferred.
- Must have own transportation, valid State of Georgia driver's license and proof of automobile insurance for traveling to outside meetings and events as well as occasional transporting of materials.

**PHYSICAL REQUIREMENTS:** Minimal physical effort required with intermittent standing and walking and prolonged periods of sitting in meetings or at desk working with computer. Position requires stamina to work extended days to include early morning, evening and weekend events and meetings in addition to the regular work schedule.

**Please submit cover letter and resume to [employment@jewishatlanta.org](mailto:employment@jewishatlanta.org). Please put POSITION: Philanthropic Officer in subject line.**

**COMPENSATION:**

The salary range for this position is \$80,000 - \$100,000 plus a comprehensive benefits package. Anticipated salary near midpoint; commensurate with experience.

*Jewish Federation of Greater Atlanta provides equal employment opportunities to all applicants and prohibits discrimination regarding race, religion, age, sex, national origin, sexual orientation, gender identity or expression.*