

Our mission is to lead, serve and collaborate
to mobilize enduring philanthropy
for a better Arizona.



Job Description

TITLE:	Senior Philanthropic Advisor
STATUS:	Full Time - Exempt
REPORTS TO:	Chief Philanthropy Officer
BUSINESS UNIT:	Philanthropic Services
DATE:	7/11/16

Nature of Work

This full time position focuses on cultivating relationships with existing donors, potential donors and professional advisors in order to increase ACF's assets through contributions to existing funds, major gifts, new funds and planned gifts statewide. This position will focus primarily on the metropolitan Phoenix area. He/she will develop and secure new business by building close relationships with professional advisors (estate planning attorneys, CPAs, financial planners, insurance agents, trust officers, private bankers, brokers, etc.) and their clients and will work in collaboration with other ACF staff and business units. He/she will also play an integral role in enhancing and implementing, in conjunction with the philanthropic services team, a relationship management system designed to serve and amaze current donors, prospective donors and professional advisors. He/she will also play a team role in ACF's Center for Planned Giving programs and cultivating and securing complex gift arrangements.

Essential Job Functions

- Serves on the Philanthropic Services Team with a focus on working donor relations, new business development and Planned Giving
- Plays a key role in enhancing and implementing ACF's statewide relationship management system for donor prospects, existing donors and professional advisors
- Interfaces with ACF board members and other volunteer committees as assigned
- Coordinates ACF Professional Advisor outreach system, including Professional Advisory Board, Professional Education Series, Tax & Legal Seminar and other key strategies for building relationships with professional advisors
- With the Philanthropic Services Unit, will contribute to and execute the overall Philanthropic Services development strategy
- Cultivates new business by developing productive working relationships with estate planning attorneys, CPAs, financial planners, insurance agents, trust officers, private bankers, corporate leaders, brokers and other professional advisors

- Works closely with Technology staff to use Salesforce to identify and track prospects for new and existing funds as needed
- Cultivates and solicits prospects for new ACF gifts; receives and acts on referrals from professional advisors, board members and community members
- Cultivates enduring relationships and provides exemplary customer service to current donors, with ultimate goal of increasing lifetime contributions as well as planned gifts.
- Possesses the capacity and attitude to serve and amaze donors and professional advisors.
- Implements and leads various ACF Business Plan strategies as assigned.

Knowledge or Skills

- Bachelor's degree + 3 years experience in nonprofit sector required; CPA, CFP, JD degree or planned giving certification preferred and may substitute for nonprofit experience
- Experience with nonprofit industry development practices combined with knowledge of the latest best practices relative to the development field at large
- Extensive background in donor stewardship and constructing donor development plans
- Outstanding written and oral communication skills; research skills; ability to analyze, think critically and explain alternatives clearly
- Strong interpersonal skills: Ability to actively listen and to work with widely diverse individuals and groups, including donors, volunteers and community leaders, demonstrating professionalism and confidentiality
- Ability to work as part of a professional team with enthusiasm and commitment and ability to take initiative and work independently
- Experience with strategic planning, management, problem-solving and decision-making
- Ability to multi-task while staying on a course of planned action
- Skill in both analytical thinking and building personal relationships
- Strong capacity to listen, keen sense of judgment and propriety, and ability to follow-up on details with great speed
- Knowledgeable in planned giving instruments and applicable tax laws

Other Requirements

- This position functions in an office environment and requires some local and/or regional travel. Incumbent must be proficient with computers; including word-processing and spreadsheets. Experience with a contact relationship management system with experience with Salesforce preferred. Computer experience and proficiency required in standard technologies such as Microsoft Office.

Major Accountabilities

- Effectively represents the Foundation in a positive manner.
- Provides professional and timely responses and service.
- Meets annual new business development and fundraising goals.
- Annually generates new donors and builds ACF's revenue and net assets.

The intent of this job description is to provide a representative summary of the major duties and responsibilities performed by incumbents of the position. Incumbents may be required to perform other job-related tasks other than or in addition to those specifically presented in this description.

ACF is an Equal Employment Opportunity Employer and does not discriminate against a job applicant or an employee because of the person's race, color, religion, sex (including pregnancy, gender identity, and sexual orientation), national origin, age (40 or older), disability or genetic information. ACF does not discriminate against a person because the person complained about discrimination, filed a charge of discrimination, or participated in an employment discrimination investigation or lawsuit.