



Greater Tacoma Community Foundation (GTCF)

950 Pacific Avenue
Tacoma, WA 98402

Philanthropy Advisor

GREATER TACOMA COMMUNITY FOUNDATION (GTCF)

GTCF connects people, knowledge, and funding to build a racially equitable, accessible, inclusive Pierce County, now and for generations to come. As a nationally accredited community foundation, GTCF is a community catalyst, connector, and knowledge facilitator, aligning funding and action through strategic philanthropic investments as well as stewarding more than 450 individual, family, and agency funds. GTCF's Philanthropy Team leads the effort to translate GTCF's Strategic Framework into action that brings abundant assets into GTCF to build a thriving Pierce County.

THE OPPORTUNITY.

GTCF is seeking an experienced philanthropic advisor with extensive knowledge of and experience with charitable giving tools and strategies to work collaboratively with donors, professional advisors and the GTCF Team to inspire catalytic philanthropy in Pierce County.

ESSENTIAL FUNCTIONS

Fund Development & Stewardship

- Develop and implement philanthropic tools and strategies to engage individuals, families, businesses, governmental agencies, nonprofits, and Professional Advisors to drive assets to and through GTCF.
- Manage a dynamic portfolio of active and prospective fund advisors to ensure proactive engagement and stewardship of relationships.
- Develop a cadence of reporting that ensures monitoring of cultivation strategies, actions, and engagement activities to ensure progression of opportunity stages.
- Leverage existing priority donor relationships to build the next generation of fund advisors, prioritizing prospect potential and capacity for new giving, renewed or elevated giving, gift planning, and activation of complex assets.
- Collaborate with professional advisors and draw on a working knowledge of current giving strategies involving cash, securities, qualified charitable distributions, charitable gift annuities, donor-advised funds, endowments, beneficiary designations, wills, and trusts.

Gift Planning & Complex Assets

- Inspire referrals and follow-up on inquiries from prospects, donor representatives, other nonprofits, and professional advisors regarding gift planning and complex assets.
- Develop and provide financial illustrations for prospective donors for charitable gift annuities and charitable remainder trusts highlighting tax and cash-flow opportunities.
- Staff the GTCF Complex Gift Committee and facilitate complex gift acceptance.
- Maintain talent cloud of support for complex gifts.

Professional Advisor Liaison

Professional Advisors include: attorneys, accountants, wealth advisors, trust officers, brokers, life insurance professionals, accountants and planned giving professionals.

- Sustain a robust Chartered Advisor in Philanthropy (CAP) alumni community.
- Co-facilitate and recruit CAP Study Cohort.
- Cultivate and strengthen relationships to increase quantity and quality of referrals.
- Serve as the key relationship manager with Professional Advisors (PAs), educating them about GTCF's philanthropic tools and services and inspiring their client's philanthropic impact.
- Prepare and hold meetings with Professional Advisors to educate them about GTCF in large events and small group sessions, as well as one-on-one meetings.

Cross-Team Collaboration

- Work in partnership as a close and valued colleague with the rest of the GTCF team, fostering and supporting cross-team collaboration, serving as a knowledge resource and thought partner to other GTCF team members, enabling them to do their best work.
- Partner with community impact, communications, and finance teams to inspire, inform, and educate constituents on charitable giving.

Continuous Learning

- Bring a commitment to Diversity, Equity, Inclusion, and Access, as well as the principles of trust-based philanthropy into philanthropic advising.
- Remain aware of trends in the field of philanthropy and their implications for GTCF, such as new approaches to giving, emerging practices, and changing legislation that impacts charitable giving.

Community Engagement

- Represent GTCF in the community, listening and learning, and serving as a trusted advisor to allied professionals, community partners, and civic and business leaders.
- Deliver presentations to build awareness of GTCF and charitable giving options.

ESSENTIAL ATTRIBUTES

- Passion and dedication to be part of creating an equitable, thriving Pierce County.
- 10+ years of relevant professional experience in estate planning, financial advising, business development, philanthropic advising, or charitable gift planning
- Chartered Advisor in Philanthropy® (CAP) designation strongly preferred and/or extensive knowledge of and experience with charitable giving strategies, including planned giving, charitable giving vehicles, and complex gifts combined with the ability to translate those details to a lay audience.

- Active engagement with professional networks such as South Sound Planned Giving Council, Leave 10 South Sound, South Puget Sound Estate Planning Council, etc.
- Relevant training and experience with the principles of Trust-Based Philanthropy
- Proficient with Microsoft 365, SharePoint, Smartsheet, and CommunitySuite preferred.
- Expert written and verbal communication skills, including strong public speaking.
- Aptitude for co-designing solutions with partners externally and internally.
- Interpersonal skills that translate to being respected and approachable.
- Effective at outreach, collaboration, and building and sustaining strong relationships.
- Ability to strategize for the future while performing tasks in the present.
- Highly organized with demonstrated ability to manage multiple tasks and priorities.
- Dedication to confidentiality and documentation of relationships and connections.
- An action-oriented personality that thrives in a fast-changing environment.

COMPENSATION

GTCF offers sustainable compensation packages that are competitive with similar philanthropic sector positions requiring comparative talent, experience, and skills so that GTCF retains a thriving, productive staff team capable of advancing our strategic framework.

The salary range for this position is \$105,000 to \$135,000 annually.

GTCF has a 36-hour work week with standard business hours Monday through Thursday and Fridays closing at 12 pm. This is a hybrid work environment, with collaborative meetings in person as well as a home office structure.

Other benefits include 3 weeks' vacation in the first year, 16 fixed holidays including the full week of Thanksgiving, 2 floating holidays, 2 personal days, 8 sick leave, health, vision, and dental insurance, short- and long-term disability insurance, 401(K) retirement plan, life insurance, free parking, free gym access and a monthly home technology stipend.

EQUAL OPPORTUNITY

GTCF is an equal opportunity employer. As such, GTCF is committed to treating all employees and applicants equally without regard to race, color, creed, religion, sex, sexual orientation, gender identity or expression, age, national origin, citizenship, veteran or marital status, disability, and all other bases protected by state and federal law.

GTCF values diversity among its staff and is committed to ensuring equal employment opportunity in all aspects of the employment relationship.

Please send a letter of interest and resume to hr@gtcf.org. Resumes will be accepted until the end of day Wednesday, August 2nd, 2023.