



The Opportunity | *Winston-Salem Foundation – Senior Philanthropic Advisor*

We are a nonprofit community foundation, comprised of over 1,650 funds, that assists people and organizations with their charitable giving, provides financial aid to college students, and makes Community Grants to nonprofit organizations in Forsyth County. We are the oldest foundation in North Carolina, and we are one of the oldest community foundations in the country. Since 2018, the Foundation has been on a journey to deepen its understanding of and commitment to racial equity as both a priority in our work in the community and as a hallmark of our organizational culture.

Our vision:

A generous and trusting community where everyone is thriving.

Our mission:

We inspire giving and link resources to action, strengthening Forsyth County—now and forever.

Our values:

- **Inclusion** – we practice and champion inclusion, honoring the strengths and experiences of all in our community.
- **Accountability** – we honor the intentions of our donors and partners and hold ourselves to the highest standards of ethics, service and stewardship.
- **Continuous Learning** – we are committed to learning and evolving with our community and our partners.

The Position | *Senior Philanthropic Advisor*

The senior philanthropic advisor is a leading member of the Development and Donor Services department, which cultivates and maintains relationships with the Foundation's donors. The senior philanthropic advisor develops, facilitates, and markets current and/or deferred and testamentary gifts from existing and prospective donors. They provide counsel, advice, and strategic direction to donors, allied professionals and staff regarding various philanthropic tools, approaches, techniques, and trends. This role serves as liaison with attorneys, accountants, financial advisors, and other intermediaries and agents of wealth. As such, they plan, develop, and implement the Foundation's engagement strategy for professional advisors. In partnership with the vice president of development

and donor services, the senior philanthropic advisor is responsible for resource development and works with existing and new donors and intermediaries to secure outright and/or planned gifts. In addition to serving as a gift-planning specialist with deep institutional knowledge, this position generates ideas and explores opportunities to achieve the strategic goals of the Foundation. The senior philanthropic advisor works under the direct leadership of the vice president of development and donor services, manages the philanthropic advisor, and works collaboratively with the Foundation's staff, leadership, and volunteers. The senior philanthropic advisor is an exempt position.

DESCRIPTION OF RESPONSIBILITIES

All staff work together to live out the Foundation's mission, values, and equity commitment. Each person actively participates in education sessions, work groups, and other formal and informal opportunities to learn about and operationalize our shared commitment to equity.

Asset Development

- In partnership with the vice president of development and donor services, assist in the creation, implementation, and evaluation of growth strategies according to the Foundation's strategic plan.
- Direct the identification and cultivation of new and existing relationships to achieve the Foundation's resource development goals according to the Foundation's strategic plan.
- Utilize interpersonal savvy and confidence to network, motivate, and skillfully craft giving strategies to benefit donors, advisors, nonprofit beneficiaries, and the Foundation.
- Direct and lead the Foundation's development and cultivation of professional advisor relationships including the annual breakfast event
- Using the Gift Acceptance Policies as a guide, lead the acceptance of complex gifts including charitable trusts, real estate, closely held stock, etc. through the vetting and receiving process.
- Manage the Foundation's planned giving program including revocable trust agreements and charitable lead and remainder trusts.
- Provide team support and stewardship for various constituent groups with an emphasis on new donors, donors having multiple aspects to their charitable plans, and professional advisors.
- Respond to inquiries and follow up on requests from prospective donors and professional advisors.
- Assist in the administrative process of establishing gift plans and new funds of all types by drafting fund agreements, revocable trust agreements, correspondence, and other necessary follow up.
- In partnership with the Black Philanthropy Initiative and The Women's Fund of Winston-Salem, strategize ways to engage people of color and women in the charitable work of the Foundation.
- Demonstrate the Foundation's commitment to accountability by honoring donor intent, furthering donors' charitable goals, and seeking to engage charitable partners to address the most pressing needs of the community.
- Maintain accurate records for all contacts with donors, prospective donors, and professional advisors.

Promotion of Philanthropy

- Develop strong relationships throughout the community with existing donors, prospective donors, and professional advisors to share knowledge of charitable giving strategies/techniques and promote the comparative benefits of charitable partnerships with the Foundation.
- Represent and position the Foundation as an effective and impactful charitable partner through community presentations and engagement.
- Plan and participate in appropriate cultivation/education events and gatherings for donors, prospective donors, and professional advisors.
- Collaborate with the vice president of development and donor services and the Marketing and Communications team to develop collateral materials that highlight the Foundation's products and services as a charitable partner and knowledgeable community leader.
- Maintain current knowledge of philanthropic trends, legislation, and planned giving techniques that impact the field of philanthropy in general and charitable funds in particular.
- Participate in local, regional, and statewide groups to promote working with community foundations.

Fund Administration

- Collaborate across teams to clarify and document gift plans.
- Assist with fund questions, document changes, and future plans.
- Oversee the documentation and execution of charitable plans and matured gifts to follow through on donor intent.

Other Related Activities

- Manage the philanthropic advisor.
- Manage a portfolio of donors.
- Perform other duties as assigned.

QUALIFICATIONS

- Bachelor's degree required; Post graduate degree preferred
- Chartered Advisor in Philanthropy® (CAP®) designation or willingness to obtain
- 7+ years' experience in philanthropy and/or financial planning, planned giving, or trust and estate planning
- Management experience preferred
- Strong commitment to the Foundation's values and understanding of racial equity
- Ability to interact respectfully with people of diverse backgrounds, perspectives, and cultures
- Commitment to continuous learning
- Strong interpersonal skills

- Strong organizational skills and demonstrated ability to manage and execute multiple projects and priorities
- Strong communication skills and attention to detail
- Understanding of a constituent management system and its importance in development work
- Demonstrated ability to work collaboratively, giving direction, and expressing empathy

The Winston-Salem Foundation is committed to building a staff that reflects the community served by the Foundation's mission and strategic priorities. We invite applications from diverse candidates, especially those with direct experience in the priority issues and work of the Foundation.

HYBRID WORK SCHEDULE

The Foundation offers a hybrid schedule where most staff are expected to work in person at least two to three days per week. Some positions, such as the senior philanthropic advisor, are expected to be in person more frequently due to the nature of their responsibilities. The senior philanthropic advisor will be expected to be in-person a minimum of four days per week. Our offices are in downtown Winston-Salem.

SALARY AND BENEFITS

Salary will be commensurate with experience and expected to be between \$95,000 and \$110,000. Benefits include paid vacation, holidays, and sick leave. Health insurance, life insurance, dental insurance, and short-term and long-term disability insurance begin the first of the month following 30 days of employment. Eligibility for the defined benefit retirement plan begins after one year of service. Other optional benefits include a flexible benefit plan, supplemental insurance with AFLAC, employee supplemental retirement plan, charitable match program, and tuition and fee reimbursement.

The Winston-Salem Foundation is committed to building a staff that reflects our community and encourages applications from a diverse candidate pool.

[Apply Here](#)

Capital Development Services (CapDev) has been retained by Winston Salem Foundation to assist with professional recruitment. Candidates should include a cover letter and a resume. All material will be kept confidential. Additional inquiries may be directed to Amy Bridges at search@capdev.com.