FOUNDATION FOR THE CAROLINAS

JOB DESCRIPTION

Title:	Vice President, Center for Personal Philanthropy	Division/Department:	Philanthropic Advancement

Reporting To: Senior Vice President, Philanthropic Advancement

FLSA Classification: [x] Exempt [ ] Non-Exempt

Employment Type: [x] Full Time [ ] Part Time [ ] Intern [ ] Contract

POSITION SUMMARY

The Vice President for the Center for Personal Philanthropy leads relationship management for FFTC's Center for Personal Philanthropy, the division of FFTC representing approximately $1B in assets across 750+ fund relationships.

The Vice President utilizes strategic vision to develop and implement annual stewardship work plans focused on outcomes which align with FFTC's overall goals and plans, working in conjunction with other professional members of the Advancement team on the identification and execution of strategic projects related to FFTC's value proposition, annual client and professional advisor programming, marketing efforts, customer service and other aspects that directly impact FFTC Center for Personal clients.

In addition to leading the strategy for stewardship and retention for this important client segment, the VP will retain a portfolio of assigned funds for dedicated relationship management. The VP will work collaboratively will the VP of Business Development on cross-selling and deepening current relationships (as much of FFTC's annual contributions come from current clients), the VP of Planned Giving and the VP of Family Office Parnters on shared relationships and efforts related to the lifetime and legacy philanthropic planning for current and prospective clients.

DUTIES & RESPONSIBILITIES

<u>Relationship Management</u>

- Develop strong relationships with existing donors to provide donor-centered services to meet the personal philanthropic objectives of donors and their families and deepen/expand existing client relationships
- Lead the creation of and manage the delivery of client and professional advisor virtual and in person events and programs, with an emphasis on thought leadership, best practices in philanthropy, stewardship and networking, and grantmaking/community impact.
- Serve as dedicated relationship manager for assigned family accounts to provide excellent customer service & day-to-day support, stewardship, philanthropic counsel and support for long-range charitable planning
- Consistently and effectively communicate with key, cross-functional team members to ensure the coordination among Civic Leadership, Corporate, Nonprofit or Campaign efforts as it relates to key prospects and fund holders
- Oversee the strategy & execution of the relationship management discipline for the Center for Personal including implementation of stewardship best practices & enhancements across FFTC, including

communications, events and other targeted efforts to engage members of the Center for Personal Philanthropy

- Collaborate with internal partners on client communications, creating new channels and information sharing opportunities
- Coordinate and work with Finance and Donor Relations team on complex servicing issues related to family accounts, trusts, illiquid assets or testamentary gifts
- Work with Finance & Donor Relations team on special projects related to donor stewardship, donor servicing, operational processes, etc. to enhance client deliverables
- Work on cross-functional teams across the organization for project based opportunities to better serve our clients, including technology (new website, database management), marketing & communications (new collateral / collateral updates).
- Draft, review and revise appropriate documents, in keeping with the policies and procedures of FFTC, to represent the wishes of donor, including fund agreements, addenda related to agreements, succession plans for funds, sections of planned giving documents such as wills, trusts, etc.
- Maintain donor, prospect and advisor information in Raiser's Edge donor software system to help build, track and monitor stewardship and retention efforts
- Attend community and industry events on behalf of FFTC to represent the agency, build networking opportunities, and cultivate new relationships with prospects and referral sources
- Manage processes and procedures to integrate the stewardship and growth efforts of the team, including but not limited to data tracking, dashboards, information sharing, and cross-selling.
- Work collaboratively with the Marketing & Communications Team to create and maintain strategic communications and materials to implement strategic initiatives, mini-campaigns or efforts to grow Center assets and to highlight existing fund holder relationships (direct mail, advertising, event/table sponsorships, marketing collateral, website content)
- Identify and engage in cross-selling opportunities with existing clients to expand relationships
- Special projects as assigned

<u>Business Development</u>

- Oversee and implement strategic priorities related to the growth and retention of the Center for Personal Philanthropy as well as integration of asset development efforts across FFTC, including but not limited to work with professional advisors, events, referral programs, campaigns, etc.
- Cultivate key professional advisor relationships and in partnership with the VP of Business Development, participate in advisor calls, firm presentations, continuing education programs for professional advisors and other regular communication strategies, as professional advisors are key referral sources for growing the assets of the Center
- Develop, maintain and demonstrate a command of superior product and industry knowledge, including technical financial expertise, to successfully cultivate new clients and active referral sources
- Train and educate prospects, clients and professional advisors/key referral sources regarding FFTC products and services to grow the business of FFTC
- Manage and support complex gift transfers including deferred gifts, real estate, closely held stock and other non-cash gifts in coordination with the legal team
- Manage the process and training for identification, cultivation and stewardship of prospects to seek current and planned gifts to FFTC and affiliated organizations.
- In partnership with the VP of Business Development, participate in the identification, cultivation and solicitation of prospects and the cultivation and management of key client relationships, with the goal to grow, steward and retain the assets of the Center.
- Work with team to monitor competitive landscape, identify strategic opportunities, and share feedback
- Identify, attend and support events sponsored by FFTC as prospect generation strategy

Job Qualifications

- Bachelor's degree in relevant field is required
- MBA, law degree or other graduate experience strongly preferred; licensure ideal (CFP, CIMA, etc.)
- Minimum 8 years of experience in a financial organization, nonprofit/philanthropic organization, or corporate community affairs
- Proven track record and a career history that demonstrates the ability to succeed in complex operating environments with multiple constituencies
- Excellent oral and written communications skills
- Excellent interpersonal relationship skills

Position Specific Competencies

Select from the following position-specific competencies. Please limit the total number of competencies to 10 or less.

All Employees: [x] Communication & Interpersonal Skills

Executive Team: [ ] Leadership [ ] Strategic Thinking [ ] Fiscal Stewardship

All Supervisors: [x] Delegating Responsibility & Empowering Employees [x] Managing Employee Performance [x] Ensures Consistent Policies & Practices

General:

[ ] Affiliate Management	[ ] Budgeting & Cost Awareness	[ ] Building Organizational Commitment
[ ] Building Team Environment	[X] Client Records	[ ] Concern for Employee Satisfaction
[ ] Customer Skills	[ ] Dependability	[ ] Ensures Proper Training in New Technologies
[ ] Entrepreneurial Orientation	[ ] Equipment Skills	[x] Fund Management
[ ] Implementing New Technologies	[ ] Initiative	[ ] Innovative Thinking
[ ] Job Skills	[ ] Managing Meetings	[X] Managing Multiple Priorities
[x] Meeting Targets	[x] Presentation Skills	[x] Product Knowledge
[ ] Productivity	[ ] Project Management	[ ] Quality of Work
[x] Relationship Building/Networking	[ ] Results Oriented	[ ] Technical Skills
[ ] Time Management	[ ] Training & Development	[ ] Writing Skills