

Philanthropic Advisor

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Company: SM Diversity

Location: Seattle, Washington

Category: other-general

Join our prestigious client, Seattle Foundation, and embark on a rewarding journey as a Philanthropic Advisor! With your exceptional relationship-building skills and strategic mindset, you will be instrumental in connecting with individuals and organizations both within and outside of the Foundation. Your expert guidance and advice will play a vital role in amplifying community impact and driving positive change.

Position Highlights

Salary: \$95,000 - \$105,000 Annually

Type: Permanent; Full-Time, Salary/Exempt

Location: Hybrid Work Model; Offices located downtown Seattle, WA

About Seattle Foundation

“The heart and science of philanthropy” is the intersection of philanthropic passion and data-driven solutions to create lasting change. As the community’s foundation, Seattle Foundation’s mission is to ignite powerful and rewarding philanthropy to make Greater Seattle a stronger, more vibrant community for all.

Position Overview:

This is an exciting position bridging the interests and passions of generous philanthropists and critical community needs and opportunities. By building relationships and making strategic connections within and outside the Foundation, the Philanthropic Advisor is a trusted partner to Seattle Foundation philanthropists. Our fundholders and donors cover the spectrum in terms of age, interests, and giving experience, and our goal is to meet them where they are and support them in their giving journey to high impact philanthropy through expert advising. Reporting to the Director of Philanthropic Advising, this role is responsible for supporting an array of funds (individuals, couples, multi-generational families, non-profit agency endowments and businesses) to support and advance their philanthropy and impact in the community.

Primary Responsibilities:

Develop an innovative, proactive approach to build relationships with, and engage with fundholders and prospective donors, including potential nonprofit endowment partners.

Educate fundholders about charitable options and create strategic and innovative gift plans, including the drafting of fund agreements and related documents, in order to reach their philanthropic goals in a manner consistent with Seattle Foundation's mission, best practices, and policies.

Adapt to the culture and workstyle of the client, building trust and working partnerships with a variety of stakeholders that could include fund advisors, financial advisors, business partners, etc.

Willing and able to engage in conversations with people that might challenge predominant narratives and/or their views on philanthropy or communities.

Offer personalized consulting to assigned funds to achieve their philanthropic goals and increase aligned giving in support of organizational strategic priorities.

Support fundraising for the Foundation's activities and discretionary grantmaking through targeted and collaborative solicitations with Foundation leadership.

Writing and editing collateral including (but not limited to) custom proposals and stewardship reports.

Responsible for setting clear and accurate goals within personal portfolio around fund replenishments to support revenue generation and growth.

Partner across multiple teams to understand the strategies (program and finance) to grow alignment and co-investment opportunities to support mission aligned activities.

Participate fully in the Foundation-wide fundraising plan and ensure timely documentation and tracking of moves management in the database.

Manage, as part of a team and/or independently multiple projects in donor services, fund development and outreach to prospective donors and professional/financial advisors.

Facilitate philanthropist education workshops, including (but not limited to) Giving with Impact, and plan and participate in events to raise support for the community and/or build awareness

for the Foundation.

Serve as a business development thought partner, working closely with the team to implement growth strategies and marketing plans, develop presentations, reference materials, and other outreach documents as needed.

Ensure that critical information around each fundholder is captured consistent with our systems and policies.

Stay current in philanthropic best practices, trends, and community issues, and be knowledgeable in the full spectrum of initiatives of the Foundation.

Provide support for special events and other donor-related special engagements.

Attend regularly scheduled Philanthropic Services, cross-department, and Foundation-wide staff meetings.

Participate in task force groups for special projects.

Represent the Foundation in the community at speaking engagements, professional organizations, conferences, and other community events.

Given the nature of the work, the role requires flexibility for evening meetings and events.

Requirements

Minimum of 7 years' experience including work at a community organization in development and/or program-related work; major gift fundraising; and corporate giving.

Demonstrated experience with Major Gift Fundraising and/or Planned Giving.

Proven experience in portfolio management including donor cultivation, solicitation, and stewardship.

Track record working with high-net-worth individuals and multi-generational families.

Experience in the philanthropic sector and nonprofit community in the Greater Seattle region.

Experience advising donors on philanthropic trends and opportunities; experience in corporate philanthropy and corporate social responsibility.

We are also looking for:

Commitment to the vision, mission, and values of Seattle Foundation.

Strong interpersonal skills and experience working cross-functionality

Strong relationship-building skills, with a high-quality customer-service orientation.

Excellent written and verbal communication skills, including confidence in public speaking.

Proficiency in Microsoft Word, Excel, Outlook and Relational Databases.

Strong organizational and project management skills including attention to detail.

Ability to listen, assess, and identify appropriate resources and implement solutions. Active Listening training a plus.

Demonstrated ability to meet deadlines and be composed under pressure.

Ability to work independently and collaboratively within a team in a fast-paced, evolving work environment.

Demonstrated ability of taking initiative and proactively and continually looking for ways to improve.

Benefits

Salary: \$95,000-\$105,000 Annually

100% Paid by employer: medical, dental, vision, life, AD&D, LTD. 403(b)

Retirement matched at 5%; increasing to 10% over time, 100% immediate vesting.

PTO: 3 weeks' vacation, 2 weeks sick, 4 wellness days, 15 holidays,

\$1,200 annual remote work benefit, \$750 annual wellness benefit, \$1,200 annual transit benefit; Professional development stipend, optional Flex plan and dependent coverage.

Safety and Health Requirements:

Seattle Foundation places the health and safety of its employees and the communities we serve as our highest priority. To support this priority, we require that all employees be fully vaccinated against COVID-19. Waivers are available for accepted medical and religious exemptions.

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