The Community Foundation for Greater Atlanta works to inspire and lead our region toward equity and shared prosperity for all who call our region home. We work with a shared commitment to community working with residents, neighborhoods and civic leaders across public, private and philanthropic sectors to seize the greatest opportunities and solve the region’s most pressing challenges.

Reporting to the VP of Philanthropy, the Director and Philanthropic Counsel is primarily responsible for providing expertise, strategic direction and oversight in all aspects of professional advisor programs, legally complex gifts and counsel on all philanthropic giving, contributing to the achievement of the Foundation’s goals and objectives for growth. This role is a philanthropic strategic partner, empowering donors and advisors to execute their philanthropic goals, build the capabilities of the team to service these stakeholders and increase revenue through meaningful stewardship.

Essential Functions of Position:

- **Professional Advisor Services:**
  - Design and implement strategy for a professional advisor focused program(s) including annual planning, communications, partnership management, reporting, and more; including executing events such as PALI, Balser Symposium, Balser Giving Circle, etc.
  - Develop deep, sustained relationships and networks with professional advisors and their firms to make the Foundation their trusted philanthropic partner; providing world class experiences for their clients’ philanthropic journey.
  - Meet with advisors and/or their clients, conduct firm presentations, attend quarterly advisor lunches, and maintain membership in, or sponsorships of, professional associations related to philanthropic giving.
  - Write articles and lead speaking engagements in the professional community, including an active leadership role within the Philanthropic Advisor Partnership (Jewish Foundation, United Way and Community Foundation), among other cultivation activities.
  - Educating advisors, prospects and others on the tax, financial, and other benefits of working with the Foundation.

- **Development and Philanthropic Solutions:**
  - Cultivate and solicit contributions from prospects, both individuals and organizations, to establish new funds.
  - Assist philanthropic officers in soliciting existing donors for additional gifts to their funds, involving unusual funding assets or planned gifts.
  - Cultivate and solicit contributions, making advisors and donors aware of the different philanthropic vehicles and philanthropic solutions to meet donors’ needs; seek and pursue referrals from donors, professional advisors, and current and former board members for new donor prospects; and support CEO with prospect cultivation and closing.
- Oversee the life-income gift program (charitable remainder trusts and charitable gift annuities) and prepare gift proposals using PGM Anywhere (PG Calc software).
- Assist in designing and delivering, as part of a team of philanthropy professionals, the 75th Anniversary Campaign, including support for volunteer leaders, prospect research, cultivation, and gift closing. Leading the endowment, planned giving, and complex gifts portions of the Campaign.

**Planned Giving Donors:**
- Solicit, cultivate and steward planned giving donors, through both individual touches and group stewardship utilizing the EnTrustATL legacy society framework.
- Design strategy to identify, qualify and attract new donors with a desire to increase their philanthropic impact and legacy to maximize their financial assets available for philanthropy.
- Partner with philanthropic officers to identify planned giving opportunities within their portfolio and help to close those gifts.
- Oversee activities related to matured planned gifts and receiving gift assets.

**In-House Philanthropic Resource:**
- Answer the myriad of questions regarding Philanthropy and the various funds offered by the Foundation: what types of gifts can be accepted by which type of fund, what types of grants are allowed, due diligence and expenditure responsibility requirements, endowment issues, etc.
- Identify, structure, and vet new gift opportunities; negotiate fund agreements, planned gifts, and fees for services, as well as executing complex gift processing including privately held assets and realized planned gifts.
- Draft and review various types of gift and fund agreements.
- Actively participate in the evaluation of proposed gifts and supporting organizations (“New Business”) and structure different arrangements appropriately.
- Be a knowledgeable resource for questions related to charitable giving tax law and proposed and actual changes to those laws.

**Leadership and Management:**
- Manage Gift Planning Officer(s) and work closely with other philanthropic directors and officers, providing consulting on planned gifts, non-cash asset gifts, legal issues, fund agreements and planned gift administration.
- Oversee marketing programs for professional advisors and planned giving donors, providing guidance and input to Philanthropy and Marketing team members to expand awareness of the Foundation.
- Assist the VP of Philanthropy with strategic planning for Philanthropy team, including developing, setting and reporting on metrics.
- Attend Foundation Board meetings as in-house counsel and Secretary of the Board.
- Oversee the supporting organization program, including both individual donor and entity types; setting policies, answering questions and working with Operations Manager regarding annual activity and oversight.

**Other duties as assigned.**

**Qualifications:**
- Juris Doctorate (JD) required with minimum 10 years’ experience in estate planning, taxation, planned giving, and/or financial planning
- Professional designation(s) such as LL.M., CPA, CFP, CFRE or CAP preferred
• Deep understanding of financial and philanthropy operations and administration, including investments, CRM databases, charitable tax planning, prospect research, and the fundamentals of fundraising and development
• Experience with Community Foundations preferred; experience with PGcalc preferred
• Technical knowledge of charitable tax law, planned giving and gifts of complex/illiquid assets; experience with gifts of complex assets
• Financial acumen for accurate and efficient portfolio analysis, budget management, and decision-making and working with financial professionals
• Excellent interpersonal, oral and written communication skills with ability to clearly and persuasively articulate complex ideas to diverse audiences including high net worth donors and their advisors
• Experience and demonstrated results prioritizing and focusing a team on connecting, collaborating, and engaging with professional advisors and high net worth individuals for purposes of financial and/or philanthropic planning
• Strong leadership, management, relationship building, influencing, negotiation, and conflict resolution skills, including the ability to work effectively across all levels of management and staff
• Dedication to problem-solving, efficiency, and process improvement
• Ability to organize and prioritize work and manage competing priorities for self and team members, and to use data in decision-making processes
• Commitment to service; self-starter and results-oriented
• A clear commitment to equity of opportunity and genuine respect for diversity, equity and inclusion
• Proficiency in Microsoft Office Suite including Excel, Outlook, PowerPoint, and Word. Preferred experience with philanthropy records systems database technology such as Raiser’s Edge and financial software such as Foundant

Other:
All employees are required to be fully vaccinated against COVID-19 (medical and religious exemption accommodation possible) within 30 days of hire.

The Community Foundation operates in a hybrid working environment with staff working in-office three days per week and the opportunity to work two days remote per week if in good standing.

Compensation:
To be determined based upon experience and qualifications. This position is currently being benchmarked with the anticipated salary range of $150,000-$180,000. This position is exempt and employee is eligible for the Foundation’s competitive health and benefits plan:

• Paid time off:
  o Four weeks accrued paid vacation
  o Two weeks accrued paid sick leave
  o Four mental health days
  o Two personal day
  o Two floating holidays
  o Ten holidays

• Benefits:
  o All benefits effective on date of hire – no waiting period
  o 100% employer-paid benefits (medical, dental, vision) for employee-only insurance plans
  o 100% employer-paid life insurance and AD&D
  o 100% employer-paid short-term disability and long-term disability
  o 100% employer-paid parking in downtown Atlanta or monthly MARTA card
- Affordable plans for legal insurance, critical illness, supplemental life, and more
- Employee Assistance Program

- Retirement:
  - Immediate eligibility for employee contribution to 403b plan
  - After two-year anniversary with organization, all employees receive an employer-paid contribution of 6% of their salary to a SEP-IRA plan regardless if the employee contributes to retirement

- Culture and Development:
  - Individual Development Plans (IDPs) for each team member including trainings, resources, development opportunities, etc.
  - Two wellness rooms for mental health with self-care items
  - Fun monthly employee engagement activities

To Apply:
Please submit your resume for consideration to hr@cfgreateratlanta.org with the subject line of “Director, Philanthropic Counsel”.

Due to the volume of candidates, we are unable to provide status updates to applicants or accommodate phone calls or walk-ins regarding open positions.

The Community Foundation for Greater Atlanta provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.

The Community Foundation for Greater Atlanta values diversity and inclusion; therefore we honor the diverse needs, strengths, voices, and backgrounds of all individuals in our regional community.