NORTH TEXAS COMMUNITY FOUNDATION

Job Description:

ADVISOR RELATIONS SPECIALIST FOR CHARITABLE GIFT PLANNING

POSITION DESCRIPTION

The Advisor Relations Specialist is responsible for cultivating relationships with professional advisors and driving business development to increase the Foundation's asset base. This role focuses on identifying new opportunities with advisors, their clients, and the broader philanthropic community, in 11 counties in the North Texas Region. The Specialist reports directly to the Director of Charitable Gift Planning, and works collaboratively to raise awareness of the Foundation's services and provide client-focused support for charitable giving and philanthropic planning.

ABOUT NORTH TEXAS COMMUNITY FOUNDATION

NTCF drives meaningful change through charitable investment. The Foundation helps donors meet the needs of our community by providing tax-efficient strategies to support the causes they care about most. We serve a network of generous individuals, families, and businesses intent on shaping the future of North Texas for good, forever.

NTCF offers unique employment opportunities for individuals wanting to make a positive impact in our region. We provide an inclusive and team-oriented work environment, a competitive benefits package and professional development opportunities. We are designated as a "Best Place for Working Parents" and were named as a "Best Company to Work for" by Fort Worth Inc. Magazine.

CORE RESPONSIBILITIES

ADVISOR ENGAGEMENT & PARTNERSHIP GROWTH

1. Work closely with the Director of Charitable Gift Planning to identify key business development priorities, market trends and strategic initiatives.
2. Develop key partnerships with wealth management firms, law firms, and other professional service providers to establish a steady stream of referrals and opportunities for new donor relationships.
3. Leverage existing relationships and business development opportunities to expand the Foundation's donor pipeline, focusing on high-net-worth clients and the next generation of philanthropists.
4. Engage new professional advisors (including but not limited to estate attorneys, wealth managers, CPAs) through strategic meetings, events, and educational offerings, to build long-term partnerships.
5. Cultivate a pipeline of high-value advisor prospects by attending networking events, participating in industry conferences, and seeking referrals from current partners.
6. Develop tailored value propositions for advisors, aligning the Foundation's offerings with the advisor's client needs and the Foundation's charitable giving solutions.

STRATEGIC OUTREACH & BUSINESS DEVELOPMENT

1. Proactively identify and pursue new business development opportunities by cultivating relationships with professional advisors (PAs) to increase the Foundation's visibility and influence.
2. Develop and execute outreach strategies to attract new advisors and partners who can refer clients to the Foundation, expanding the network of philanthropic supporters in each of the 11 counties.

3. Initiate and lead presentations, webinars, and seminars aimed at PAs to increase awareness of the Foundation's services and benefits, with a focus on creating opportunities for charitable gift planning.
4. Collaborate with Charitable Gift Planning and Marketing teams to develop targeted outreach campaigns and educational materials, strengthening the Foundation's brand among advisors.
5. Regularly evaluate market opportunities and track the outcomes of business development efforts, adjusting strategies as necessary to meet growth targets.

CLIENT ENGAGEMENT & GIFT PLANNING FACILITATION

1. Assist PAs in structuring charitable giving solutions within Foundation guidelines.
2. Develop personalized strategies for supporting clients' philanthropic goals and establishing charitable funds.
3. Ensure timely and responsive follow-up with advisors to maintain continued satisfaction and to identify additional opportunities.
4. Track and monitor the progress of ongoing advisor relationships, ensuring proper stewardship and continued growth of partnerships.

ADMINISTRATIVE & REPORTING SUPPORT

1. Supervisory responsibilities include coaching and development of Charitable Gift Planning Associate.
2. Maintain accurate records of business development activities, advisor contacts, and resulting philanthropic gifts or new funds, utilizing donor management systems.
3. Provide reports to the Director of Charitable Gift Planning, summarizing progress on business development goals and identifying opportunities for growth.
4. Assist with administrative tasks related to advisor engagement, such as organizing meetings, preparing presentation materials, and coordinating follow-up communications.

QUALIFICATIONS

EXPERIENCE

- 8-10 years in business development, sales, client relations, or a related field, preferably in the nonprofit, financial services, or legal sectors.
- Proven track record in new business acquisition and relationship building, with a demonstrated ability to prospect and grow new client/advisor partnerships.
- Experience with professional advisors (attorneys, CPAs, wealth managers) is strongly preferred.
- Familiarity with charitable gift planning concepts and a solid understanding of financial and philanthropic strategies is strongly preferred.
- Experience in lead generation, outreach strategies, and networking in wealth management, law, or financial advisory services is strongly preferred.
- CRM or donor management software experience preferred, with the ability to track and manage new leads and opportunities effectively.
- Bachelor's degree from a four-year college or university.

SKILLS AND COMPETENCIES

- Professional certifications related to business development, financial advising, or charitable gift planning (e.g., CFRE, CAP, CFP, JD) are preferred.
- Exceptional communication and presentation skills, with the ability to engage advisors and their clients.
- Strong understanding of business development strategies, including networking, prospecting and relationship management.
- Ability to align the Foundation's offerings with advisor needs through tailored plans.
- Ability to quickly build rapport and trust with PAs and prospective clients.
- Strong organizational skills, with the ability to manage multiple business development projects simultaneously and meet deadlines.
- Strong problem-solving skills to navigate complex donor and advisor needs.
- Self-starter with a growth mindset, able to identify new opportunities and drive innovation in advisor relations.
- Respects confidentiality and handles sensitive information with discretion.
- Proficiency in Microsoft Office Suite, with experience using CRM systems or donor databases to track leads, opportunities and progress.

BENEFITS INCLUDE:

- Medical, dental, and vision insurance
- Paid vacation, sick leave, and personal time
- Flexible Spending Account or Health Savings Account
- Traditional or Roth 403(b) with 5% employer 403(b) contributions provided after six months
- Employer paid life and disability insurance

TO APPLY

Please submit a cover letter and resume as a single PDF directed to Andrea Murphy, Human Resources, at Connect@NorthTexasCF.org. In your cover letter, highlight your relevant experience and why feel you would be an asset to the Foundation. **Please place "NTCF Advisor Relations Specialist" in your email Subject line.**