



## The Denver Foundation

**JOB TITLE:** Advisor Relations Officer

**Reports to:** Senior Director of Philanthropic Investments

**FLSA Status:** Exempt

### **POSITION SUMMARY:**

This Advisor Relations Officer is a front-line relationship manager and business development position responsible for engaging and growing our professional advisor network. The Officer will work with other impact group colleagues to drive advisor relations activities across the foundation.

### **RESPONSIBILITIES & ESSENTIAL FUNCTIONS**

#### **Professional Advisor Collaboration and Engagement (40%):**

- Engage and grow our network of professional advisors and qualify all professional advisors associated with donor funds
- Manage, recruit for, and engage our Professional Advisors Council as the foundation's premier advisor engagement tool
- Identify, develop, and promote strategies that expand the diversity of the foundation's advisor networks
- Partner with advisor networks to produce content and thought leadership on aspects of racial equity in the advisor industry
- Facilitate robust Professional Advisors Council meetings that highlight charitable planning and philanthropic topics of importance to our community
- Facilitate professional advisor events such as the foundation's Fall Workshop

#### **Fundraising and Donor Services (30%):**

- In partnership with the Engaged Philanthropy and Philanthropic Investments teams, develop a comprehensive plan for increasing Professional Advisor services and opportunities at the foundation
- Serve as the primary intake for new business inquiries from Professional Advisors
- Develop and solicit Professional Advisors for new gifts and funds
- Engage Advisor Management Fund managers as a distinct cohort to encourage the development of new funds

#### **Marketing and Promotion (20%):**

- Participate in speaking engagements and networking events (e.g., with local estate planning councils) and identify opportunities to expand the foundation's advisor audience

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- Partner with the Communications team on the publication of the foundation's quarterly e-newsletter for Professional Advisors
- Partner with the Communications team on the development of social media posts, including professional advisor-specific collateral, materials, and content

### **Departmental Collaboration and Engagement (10%):**

- Contribute to building and sustaining a positive departmental culture that supports commitment to team goals and core values and that fosters the development of individual leadership, accountability, and continuous improvement
- Work in collaboration with other Impact Group colleagues and the Communications staff to tell stories of impact for the community and for donor-specific reporting
- Work with Impact Group colleagues and Communication staff to incorporate advisors into events, convenings, and other opportunities for engagement
- In collaboration with the Director of Operational Excellence, work to ensure that technology and data are appropriately leveraged to track planned gifts, bequests, and pipeline

### **REQUIRED QUALIFICATIONS:**

- At least five years of experience in fundraising, planned giving, or financial services
- Experience with volunteer committees, boards, or affinity groups
- Knowledge and understanding of charitable giving products
- Knowledge and understanding of the high-net-worth wealth sector and tools and strategies in working with advisors and families of inter-generational wealth
- Knowledge of C-Suite and/or other CRM software for moves management purposes
- A learning orientation that's focused on building a continuous improvement and learning culture through assessment of outcomes and promoting organizational change
- Strong customer service orientation and excellent interpersonal and relational skills
- Excellent verbal and written communication skills
- Excellent problem-solving, organizational, and time-management skills
- High level of confidentiality and professionalism
- Strong attention to detail and customer service orientation
- An unwavering commitment to racial equity
- Belief in the model of community foundations
- Commitment to the philosophy of the Impact Group, bringing together all philanthropy at the Foundation
- Ability to build relationships with people of diverse backgrounds, perspectives, and cultures

### **PREFERRED QUALIFICATIONS:**

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- Certification such as CAP, CFP, CIMA
- Experience in major gifts, donor-advised funds, planned gifts and/or complex assets

**WORK ENVIRONMENT:** The position is based in an office environment with a mix of private offices and cubicles.

**PHYSICAL DEMANDS:**

- Daily communication via phone.
- Frequent extended hours in front of a computer screen with or without accommodations.
- Regular group and public speaking.
- Occasional activities occurring outdoors

**ADDITIONAL ELIGIBILITY QUALIFICATIONS:**

- Must be authorized to work in the United States

**OTHER DUTIES:** Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties, or responsibilities that are required of the employee for this position. Duties, responsibilities, and activities may change at any time.

**COMPENSATION:** This is a full-time exempt position. The Denver Foundation offers a competitive benefits package including paid time off, retirement contribution, tuition assistance, and medical, life, and disability insurances. The starting salary for this position ranges from \$65,000 to \$75,000, depending upon experience.

**THE DENVER FOUNDATION'S ANTI-DISCRIMINATION POLICY:** The Denver Foundation shall not discriminate on the basis of race, color, religion (creed), gender, gender expression, age, national origin (ancestry), disability, marital status, sexual orientation, or military status, in any of its activities or operations. These activities include, but are not limited to, hiring and firing of staff, selection of volunteers, selection of vendors, and provision of services.

*The Denver Foundation practices and champions inclusiveness in our community. We honor the diverse strengths, needs, voices, and backgrounds of all members of our community. Candidates from traditionally marginalized communities are especially encouraged to apply.*

**JOB DESCRIPTION STATEMENT:**

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I have read and understand and accept the job description including the qualifications and the requirements of the described position. I certify that I can and will perform the duties and all responsibilities required for this position.

Printed Name:

Date:

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Signature:

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