

**COMMUNITY FOUNDATION OF SARASOTA COUNTY**  
**JOB PROFILE: Philanthropic Advisor**

**Date:** 7/1/24  
**Reports to:** Vice President, Philanthropy  
**Supervises:** N/A  
**FLSA Status:** Exempt

**Purpose:**

The Philanthropic Advisor develops trusted, long term relationships with existing donors, prospective donors, financial advisors, and the community at large, helping to align philanthropic intentions with charitable giving opportunities available through the Community Foundation of Sarasota County.

**Responsibilities:**

- Identify, cultivate, solicit, and steward a portfolio of prospects, donors, and professional advisors to further their relationships with CFSC.
- Lead, plan, implement and continually refine meetings, events, services, programs and products that meaningfully engage donors in their philanthropy, their relationship with CFSC, and with each other.
- Represent CFSC at on-site and off-site social events and related events (some events are before and after regular business hours, weekdays and weekends).
- Cultivate relationships with community organizations, institutions and associations.
- Maintain portfolio management responsibilities for donor advised and other funds as assigned, assisting donors in the furthering of their charitable goals, generating additional contributions to CFSC funds and referrals to other prospective donors.
- Utilize the Foundation software (FIMS) to track and record relationships, build donor profiles, and research donor interests and giving patterns.
- Prepare (and make) presentations for prospective donors and financial advisors, utilizing all available subject matter expertise/insights and data available from internal resources.
- Participate in cross-departmental discussions/sharing of knowledge in order to ensure optimal donor support.
- Serve as CFSC liaison to Giving Circles, if needed.

**Position Qualifications:**

- Bachelor's degree. A combination of related experience and education *may* substitute for degree.
- 5 years in planned giving (i.e, cultivating, soliciting, closing planned and/or major gifts) or related roles in development and/or marketing.
- Highly organized, detail-oriented, flexible; solution-oriented, problem solver.
- Proficient at public speaking.
- Highly developed written and verbal communication skills; able to maintain positive relationships through active listening.
- General knowledge of investments and the financial services industry; able to effectively communicate technical content (financial, programmatic, investment-related) to donors and prospects.
- Proficiency with Microsoft Office Suite; moderate to advanced Word, Excel and PowerPoint skills.
- Foundation-specific software or other database experience helpful.
- Able to self-support for basic computer and network problems.