GULF COAST
COMMUNITY
FOUNDATION

Headquartered in Venice, FL and with a second office in downtown Sarasota, FL, Gulf Coast Community Foundation was founded in 1995 to serve our community - forever. Together with generous donors, dedicated community partners, and an innovative team of talented employees, Gulf Coast identifies the needs of our community and leads strategic efforts to transform them. The Foundation has surpassed granting over $575 million in the areas of: health and human services, civic and economic development, education, arts and culture, and the environment. Gulf Coast was named one of the "Best Nonprofits To Work For" nationally. To learn more, visit GulfCoastCF.org and follow us on Facebook, Instagram, and LinkedIn.

Job summary: Director of Professional Advisor Relations

Reports to: Vice President of Philanthropy

Status: Full-time, Exempt, Salaried

To Apply: Send resume to: jointheteam@gulfcoastcf.org

The **Director of Professional Advisor Relations** is a key member of the Philanthropic Team, reporting to the Vice President of Philanthropy. The Director of Professional Advisor Relations will play a pivotal role in building and maintaining relationships with professional advisors—such as financial planners, attorneys, trust officers and accountants—who provide key services to our philanthropic partners. This position will focus on promoting Gulf Coast's offerings and cultivating positive relationships that facilitate donor engagement and contributions. By focusing on personalized professional advisor engagement and education, the Director of Professional Advisor Relations contributes significantly to Gulf Coast's mission of fostering a culture of giving and creating lasting community impact.

Essential Duties and Responsibilities

Relationship Management

- Identify, cultivate, grow and maintain relationships with professional advisors in the region.
- Act as the primary point of contact for advisors, responding promptly to inquiries and requests.
- Serve as liaison between professional advisors and the Gulf Coast philanthropic and finance teams to ensure smooth collaboration.
- Develop and implement personalized stewardship plans to ensure long-term professional advisor engagement and satisfaction.

Philanthropic Strategy and Education

- Provide training and resources for advisers about Gulf Coast's services, charitable giving options, and tax benefits.
- Organize workshops, seminars, and informational events to educate advisers and their clients regarding philanthropy and community impact.
- Stay informed about community needs and Gulf Coast's initiatives to effectively connect professional advisors with meaningful giving opportunities for their clients.
- Create and provide charitable giving proposals for advisors to use with clients.

Strategic Outreach

- Identify and implement outreach strategies to engage new professional advisers.
- Develop marketing materials and communication strategies to highlight services and expertise.
- Assist Brand Strategy in planning and executing professional advisor recognition and cultivation events.

Internal Collaboration, Reporting and Evaluation

- Monitor and evaluate the effectiveness of adviser engagement strategies.
- Provide regular reports to Vice President of Philanthropy on progress, challenges, and opportunities.
- Collaborate with other departments to gather information on Gulf Coast's programs and impact to share with professional advisors.
- Maintain accurate and up-to-date professional advisor records in the organization's database.
- Prepare regular reports on professional advisor engagement activities and outcomes.

Required Education and Experience

- Bachelor's degree in a relevant field such as Nonprofit Management, Business, or Communications.
- Minimum of three years of experience in sales, donor relations, major gifts, or a related field in the nonprofit sector.
- Demonstrated success in cultivating and stewarding relationships.
- Strong understanding of various charitable giving vehicles and philanthropic trends.
- Excellent interpersonal and communication skills, with the ability to build trust and rapport with diverse professional advisors.
- Strong presentation and public speaking skills with experience in public speaking and donor education.
- Strong emotional intelligence and ability to navigate sensitive conversations.
- Strategic thinking and problem-solving skills.
- Self-motivation and ability to work independently while contributing to team goals.
- Attention to detail and ability to manage multiple relationships simultaneously.
- Commitment to confidentiality and the highest standards of service.
- Adaptability and comfort working in a dynamic, mission-driven environment

Preferred Qualifications

- Advanced degree or professional certification in financial planning, wealth management, or a related field (JD, CFP, CAP, CPA).
- Experience working in estate planning, finance, trust services or a community foundation.
- Knowledge of the local community and established relationships with key stakeholders.
- Background in financial or estate planning, with the ability to discuss complex giving strategies.
- Experience in developing and implementing professional advisor outreach plans.
- Demonstrated ability to translate complex philanthropic concepts into easily understandable terms for all audiences, advisors and their clients.

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WHY WORK AT GULF COAST COMMUNITY FOUNDATION?

EXPERIENCE - We are empowered to deliver an exceptional (+1) experience to our donors, nonprofit and community partners, Board of Directors, and colleagues. Our mission is Together with our donors, we transform our region through bold and proactive philanthropy.

WORKPLACE- Our hybrid workplace, digital communications, and open office space encourages interaction, communication, and collaboration. We create intentional opportunities for our team to connect to foster transparency, collaboration, and sharing of information.

CULTURE - Our cohesive culture is sustained through our high-trust environment where employees are encouraged to identify and develop knowledge and skills, take measured risks, and push boldly into the future. Our values are Integrity, Leadership, Collaboration, and Excellence.

TECHNOLOGY - We have integrated advanced technology and provide employees with the tools needed to succeed while working in a hybrid environment.

EXCELLENT AND AFFORABLE STAFF BENEFITS

- **HYBRID WORK MODEL** that is highly collaborative and supportive of work-life balance
- **No-Cost Health Insurance** (Employee Only Coverage) – PPO or HMO (with FSA), or HDHP (with HSA) or monthly allowance if externally insured (proof required); affordable dependent coverage offered with employer contribution toward total cost
- **No-Cost** telemedicine for our employees and their families
- **No-Cost** dental coverage for employees and their families with rollover benefits
- **No-Cost** Life, AD&D, Short-Term and Long-Term disability insurances
- Low-Cost vision coverage for employees and their dependents
- Low-Cost pet care discount plan
- Monthly allowance of $150.00 toward cell phone utilization
- Travel and mileage reimbursement for work-related activities
- Health and wellness discount programs
- Supplemental insurances offered by Colonial
- **SUBSTANTIAL LEAVE TIME** including **200** hours (or 25 days) of PTO annually, no waiting period (pro-rated for the current year), with rollover eligibility, 12 full-day and 2 half-day paid holidays, modified medical and family leave, paid family leave, paid time off to vote and for poll volunteers.
- **EXCEPTIONAL 401K PLAN -** 4% employer match after 90 days; + discretionary contribution of up to an additional 5% following completion of 12 months of continuous employment
- **STAFF AND ORGANIZATIONAL DEVELOPMENT INVESTMENTS -** Staff retreats and team building events, and off-site staff celebrations and family gatherings plus opportunities for ongoing training and development opportunities (conferences and/or trainings)
- **FREE AND CONFIDENTIAL** employee assistance program that offers employees and dependents a variety of tools, resources, and services to support their health, goals, and overall well-being