

THE FOUNDATION

The Miami Foundation builds the philanthropic, civic, and leadership backbone for Greater Miami. Since 1967, the Foundation has invested \$485 million to strengthen our community with partnerships and contributions from more than 1,000 fundholders and 35,000 donors. The Miami Foundation, which currently manages over \$445 million in assets, mobilizes donors, nonprofits, leaders, and locals to set a bold vision for our community's future and to invest in a stronger, more equitable, more resilient Greater Miami.

POSITION DESCRIPTION

As the Senior Gift Planning Officer, you will be responsible for leading our Foundation's legacy programs, which fuel the long-term permanent resources that enable our Foundation to impact lasting change in Miami. In addition to building meaningful engagement programs to nourish our existing legacy donors, the chosen leader will deepen and broaden our Professional Advisor Network, building powerful relationships with wealth advisors across Greater Miami to inspire increased referrals and philanthropic partnerships that grow our legacy portfolio.

The Senior Gift Planning Officer will report to the Director of Philanthropy, and work closely with the Vice President of Philanthropy, driving toward the teams' goals of fostering magnetic giving by leveraging the power of networks, inspiring contagious generosity, and making bold community impact possible.

DUTIES & RESPONSIBILITIES

Professional Advisor Network

- Cultivate strong relationships with professional advisors regarding charitable giving and services offered through the Foundation to assist them in ensuring their clients are able to achieve their philanthropic goals.
- Increase Network membership.
- Collaborate with Foundation colleagues to develop, implement, and evaluate the Foundation's outreach strategies and marketing materials.
- Research and customize advisor-specific services for potential donors, incorporating donor requests and seeking internal or external advice from other professionals as needed.

Education and Outreach

- Reach out to professional advisors and private foundation representatives to share Foundation expertise.
- Present on various topics related to the Foundation, specific to donors, advisors, nonprofit and community leaders, government officials and other audiences.
- Represent the Foundation at conferences and meetings of professional associations.

Nourish Existing Legacy Donors

- Design and oversee a calendar of engagement activities, to maintain meaningful connections with our legacy society members, fortifying those relationships.

Endowment Growth

- Identify, cultivate and solicit fund prospects.
- Increase additions to the Legacy Society and Ruth and Richard Shack Society.

Quality and Standards

- Create efficiencies within the Foundant software in order to deliver the highest quality product to the Foundation's stakeholders with the smallest margin of error.
- Assist in developing and maintaining National Standards compliance as it relates to the Philanthropy department.

This list of essential responsibilities and requirements is not intended to be exhaustive. The Miami Foundation reserves the right to revise this job description as needed to comply with actual job requirements.

POSITION REQUIREMENTS

Essential Qualities

- **Strong interpersonal skills** - Exceptional commitment to delivering the highest-quality customer service and ability to work with diverse stakeholders.
- **Proactive and solution-oriented** – Actively seeks opportunities to maximize impact or overcome challenges. Creative and resourceful in seeking or developing solutions.
- **Strong project and time management skills** – An adeptness at using organizational methods and tools to manage multiple workstreams with ease and effectiveness, while maximizing shared visibility and accountability.
- **Enthusiasm to contribute to a joyful team** – Embodiment of our [team core values](#)

Desired Experience

- 5-7 years' experience in estate planning, planned giving, donor cultivation and solicitation.
- Proficiency in constituent relational databases; specific working knowledge of Foundant software preferred.
- Bachelor's degree or greater.

Must be available to work outside of traditional business hours, to travel locally and occasionally regionally and nationally.

SPECIFICS

- Position available: Immediately
- Status: Full Time, Exempt
- Place of work: Miami. Hybrid. Partially remote and partially in office or in community.
- Salary range: \$56,000- \$84,000 commensurate with experience and qualifications

Please apply [here](#).

We offer a comprehensive and generous benefits package which includes medical, dental, and vision insurance, a 403(b) retirement plan, flex spending and dependent care accounts, professional development stipend, paid time off, cell phone stipend and gym reimbursement.

The Miami Foundation's Anti-Discrimination Policy - The Miami 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 Miami 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.