DIRECTOR / SENIOR DIRECTOR OF PHILANTHROPIC ENGAGEMENT

The Miami Foundation

Department: Philanthropy | Reports To: Vice President of Philanthropy

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The Miami Foundation is building the home base for generosity and community impact in Greater Miami. Since 1967, The Foundation has invested over $900 million to strengthen our community in partnership with more than 1,000 partners and over 60,000 donors.

By accelerating leadership, generosity, and a sense of belonging across Miami, we inspire people to become changemakers and create ways for donors, nonprofits, leaders, and locals to work together on solutions for our community.

At The Miami Foundation, everyone has a role they can play in creating a thriving Greater Miami.

Position Overview

The Director/Senior Director of Philanthropic Engagement will lead The Miami Foundation's efforts to build and deepen relationships with professional advisors and grow the Foundation's legacy and planned giving programs.

This is a highly relationship-driven role for someone who thrives on being in the community, building authentic connections, facilitating conversations, presenting to groups, and creating opportunities that lead to long-term philanthropic partnerships.

The ideal candidate is a confident and engaging connector who can walk into a room of estate attorneys, wealth advisors, financial professionals, accountants, and other community leaders and quickly establish credibility and rapport. This person should be naturally curious, comfortable initiating conversations, and skilled at turning relationships into meaningful opportunities.

While knowledge of planned giving and philanthropy is important, The Miami Foundation is open to candidates who bring strong relationship-building, business development, networking, presentation, or professional-advisor experience and have the ability and interest to learn the technical aspects of philanthropy and charitable planning.

The Director/Senior Director reports to the Vice President of Philanthropy and works closely with the Foundation's CEO, Leadership Team, Board of Trustees, philanthropy team, donors, and external professional advisors.

Key Responsibilities

Professional Advisor Engagement

- Serve as a primary relationship manager for professional advisors, including estate planning attorneys, trust officers, wealth managers, financial advisors, accountants, family office professionals, and philanthropic consultants.
- Build, expand, and manage The Miami Foundation's professional advisor network.
- Develop meaningful relationships with advisors and their firms that position The Miami Foundation as a trusted resource for charitable planning and community impact.
- Proactively identify and cultivate new relationships with centers of influence throughout Greater Miami.

- Create opportunities for advisors to learn about The Foundation, its services, philanthropic resources, and community impact.
- Organize and facilitate educational programs, networking events, roundtables, presentations, and other advisor-focused experiences.
- Represent The Miami Foundation at professional, civic, philanthropic, and community events.
- Develop strategies to turn advisor relationships into referrals, donor introductions, philanthropic partnerships, and long-term engagement.

Legacy & Planned Giving

- Lead the Foundation's legacy and planned giving strategy.
- Identify, cultivate, solicit, and steward donors interested in creating long-term philanthropic impact.
- Grow the pipeline of documented estate commitments and other deferred gifts.
- Work with donors and their advisors around bequests, beneficiary designations, charitable trusts, donor-advised fund succession planning, and other planned giving opportunities.
- Partner with internal teams, attorneys, financial professionals, and other advisors to facilitate complex charitable gifts.
- Steward existing legacy donors and create meaningful engagement opportunities for members of the Foundation's legacy community.
- Oversee the administration and stewardship of realized bequests and estate gifts in partnership with legal, finance, and operations teams.
- Maintain accurate documentation, tracking, reporting, and stewardship of legacy commitments.
- Stay current on trends in estate planning, wealth transfer, charitable tax strategies, and planned giving.

Relationship Development & Business Development

- Build a strong prospect pipeline through networking, referrals, advisor relationships, community engagement, and professional associations.
- Identify opportunities to introduce individuals and families to The Miami Foundation's philanthropic services.
- Develop customized engagement strategies based on the needs and interests of donors and their advisors.
- Collaborate with philanthropy colleagues to transition and advance qualified donor opportunities.
- Serve as an ambassador for The Miami Foundation throughout the Greater Miami community.

Leadership & Collaboration

- Depending on level and experience, supervise, coach, and develop philanthropy staff.
- Partner with the Vice President of Philanthropy on department strategy, revenue goals, and donor engagement initiatives.
- Collaborate across the Foundation to ensure seamless experience for donors and professional advisors.
- Prepare pipeline reports, relationship updates, performance metrics, and other materials for leadership and the Board.
- Identify emerging opportunities in charitable planning, wealth transfer, and professional advisor engagement.

What We're Looking For

Experience

We are open to candidates from a variety of backgrounds. Relevant experience may include:

- 7+ years of progressively responsible experience in philanthropy, planned giving, wealth management, private banking, trust administration, estate planning, financial services, professional-advisor relations, business development, or a related field.
- Demonstrated success building relationships with professional advisors, high-net-worth individuals, community leaders, or other influential stakeholders.
- Experience developing referral networks, strategic partnerships, or business relationships.
- Experience presenting to groups, facilitating events, or representing an organization publicly.
- Experience with planned giving, estate planning, charitable giving, or complex gifts is strongly valued but can be developed for the right relationship-oriented candidate.
- Supervisory experience is preferred for the Senior Director level.
- Credentials such as CAP®, CFP®, JD, or comparable expertise are helpful but not required.

Skills & Attributes

- Exceptionally strong interpersonal and relationship-building skills.
- Confident, engaging, and comfortable initiating conversations with new people.
- Ability to naturally "work a room" and build relationships.
- Strong presentation, facilitation, and public-speaking skills.
- Excellent verbal and written communication.
- Strong business development and networking instincts.
- Ability to establish credibility with sophisticated professional audiences.
- Curious, entrepreneurial, resourceful, and proactive.
- Strong emotional intelligence and the ability to read a room and adapt communication style.
- Comfortable working independently while collaborating effectively with a team.
- High integrity, sound judgment, and discretion when handling sensitive donor and estate information.
- Genuine interest in philanthropy and Greater Miami's community.

This list of essential functions is not intended to be exhaustive. The organization reserves the right to revise this position specification as needed to comply with actual job requirements. Our client is committed to equal opportunity for all, without regard to race, religion, color, national origin, citizenship, sex, age, veteran status, disability, genetic information, or any other protected characteristic, and will make reasonable accommodations for known physical or mental limitations of otherwise qualified employees and applicants with disabilities unless doing so would impose an undue hardship.

Compensation & Benefits

Commensurate with experience and qualifications, the salary range is $100,000-$130,000, with senior level candidates expected to be at the midpoint or higher. The Foundation offers a comprehensive and generous benefits package, which includes medical, dental, and vision insurance; a 403(b)-retirement plan; flexible spending and dependent care accounts; a professional development stipend; paid time off; a cell phone stipend; gym reimbursement; and the opportunity to establish a Staff Donor-Advised Fund (DAF), with a modest match from the Foundation.

The Search Process

Aligned Solutions has been retained by The Miami Foundation on an exclusive basis to lead this search. All inquiries, nominations, and applications will be held in strict confidence. To apply, or to recommend a candidate for consideration, please submit a resume and letter of interest to the retained search contact below.

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