



ADVISOR AND COMPLEX GIFTS PROGRAM MANAGER JOB DESCRIPTION

About Us

We are a faith-based community foundation, working to develop endowed funds and Donor Advised Funds to support the outreach and ministries of the Catholic community. We are “small but mighty.” We are passionate about increasing Catholic philanthropy in support of our ministries and the people they serve. We are committed to our vision, and also to having fun as we work to implement that vision. We are an independent 501c3 organization, separate from the Diocese of San Jose.

We are increasing our focus on relationships within the broad “trusted advisor” community (CPAs, estate planning attorneys, insurance professionals and wealth managers).

POSITION OBJECTIVE

To coordinate all activity with advisors, manage development of our complex gift offerings, and cultivate individuals and families as appropriate. Examples of complex gifts: Real estate, Annuities, Restricted Stock, Partnership Interest, etc.

Location: San Jose **Hours:** 20/week, some evening and weekend events

Essential Job Duties & Responsibilities

- Develop and execute complete Advisor outreach program, in coordination with Executive Director and Marketing Manager
- Develop and implement all complex gift policies and programs; cultivate appropriate partnerships
- Support board and committee members as necessary in outreach and development efforts
- Provide timely customer service to all constituents of the Foundation
- Work closely with Endowment and Planned Giving Manager and Operations Manager in program implementation
- Work effectively with donors in support of their parishes and other Catholic organizations.

Position Qualifications

The requirements listed below are representative of the knowledge, skill, and/or experience required to perform this job successfully. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- A minimum of a bachelor’s degree
- Understanding of Catholic stewardship and philanthropy and a desire to serve and assist others
- Strong finance skills, ability to understand and communicate complex gifts
- Strong interpersonal skills, with an ability to work with all stakeholders (donors, clergy, staff, advisors, board, etc.)
- Excellent written and oral communication skills, including ability to effectively communicate with all constituents
- Comfort and experience with asking for financial support of a mission
- Ability to maintain confidentiality



- Proficiency with Microsoft Office applications including Word, Excel, and Outlook
- Database experience/knowledge preferred, including Raiser's Edge
- Flexibility in adapting to changing needs and multiple assignments
- The ability to work with others in a collaborative team environment or independently
- The ability to apply common sense understanding to everyday situations, prioritize assignments, and carry out detailed written or oral instructions
- Ability to work nights and weekends (occasionally)
- The ability to exert up to 20 pounds of force occasionally, and/or up to 10 pounds of force frequently, and/or a negligible amount of force constantly to move objects.

Preference will be given to qualified candidates who also have the following:

- Understanding of the parish structure and programs/process within the Diocese of San Jose
- Experience working with advisors
- Experience in the development office of a philanthropic organization
- Experience with complex gifts (equities, IRAs, cryptocurrency, annuities, etc.)
- Experience working at a Foundation
- Experience working with legal agreements and or legal educational background
- Ability (and flexibility) to thrive in a small office
- Passion, enthusiasm, focus, creativity, humor and positive outlook

Position reports to: Executive Director

WORKING ENVIRONMENT

The Catholic Community Foundation of Santa Clara County is an equal opportunity employer. This is a twenty-hour per week non-exempt position in a small but growing office. The hours for this position vary and do occasionally require evening and weekend work. The Catholic Community Foundation is a smoke-free facility.

Competitive salary and benefits

Submit resume & cover letter to: info@cfoscc.org

Learn more about us: www.cfoscc.org