



JOB POSTING

Posting Date: 6/22/2023
Title: **Charitable Gift Advisor**
Type: Salary, Full Time

ABOUT NEW COVENANT TRUST COMPANY

New Covenant Trust Company empowers churches, church institutions and church members to create and sustain healthy and vibrant ministries through faithful stewardship of investments. Our investment philosophy and approach are driven by the shared faith, values and integrity of the Presbyterian Church (U.S.A.). As a proud part of a faith community, everything we do revolves around helping that community flourish. We have a faith-based culture of service and compassion and hold true to those values in all of our work.

We are a full-service financial planning, investment management and trust services firm. As a wholly owned subsidiary of the Presbyterian Church (U.S.A.) Foundation, we are called to serve our client churches and their constituents. It is our mission to steward and distribute funds so that the mission of our client churches can be carried out for generations. We strive to cultivate, attract, and manage financial resources of individuals and institutions to further Christ's work. We work hard to strengthen congregations and related mission and ministry efforts by developing gifts and managing funds on their behalf. We offer expert strategy, visioning and guidance on everything from investment advising and portfolio management to charitable trust services and endowments. Because we are part of the church, we have a unique understanding of the financial opportunities and challenges our institutional clients face. Through our services, we help connect people with their dreams for the future and help build communities of generosity. We create lasting legacies of faith and hope.

THE OPPORTUNITY

The Charitable Gift Advisor will assist our constituents to develop information and relationships to support our client church's initiatives of charitable gift planning services. With a thorough understanding of various giving strategies, the Charitable Gift Advisor will assist donors as they determine the most effective way to achieve their charitable financial goals. They will provide all necessary information to allow prospective donors to decide about the use of the New Covenant Trust Company, or its parent company, The Presbyterian Foundation, in collaboration with their church foundation. This includes educating and assisting staff, prospects, and clients with expertise on charitable gift strategies. Through active listening, they will craft a giving plan based on donor interests, desires, and expectations. This is a collaborative, team focused environment working with New Covenant Trust Company (NCTC) and the client staff, adhering to NCTC's core values, and regularly acknowledging each team member's contribution to the process. The Charitable Gift Advisor reports to the Executive Vice President, General Counsel/Chief Compliance Officer of New Covenant Trust Company.

CANDIDATE PROFILE AND RESPONSIBILITIES

- Lead NCTC's charitable gift planning services to our clients, particularly the Presbyterian Foundation, and other ecumenical partners.
- Manage a portfolio of major prospects and churches.
- Develop major gift/planned giving materials and communicate relevant information to NCTC and the Presbyterian Foundation Staff.
- Support the efforts of the Ministry Relationship Officers and institutional and church clients.

- Familiarity of IRS regulations related to charitable giving, financial and estate planning. The incumbent uses this knowledge to help educate prospects, donors, clients and internal staff on charitable gift planning.
- Provide at least quarterly training to internal staff on trends and/or upcoming regulations and to clients on topics of interest.
- Attend training and professional programs necessary to maintain abilities and any previously earned accreditations at NCTC's expense.
- Research and stay current on charitable gift planning legislation and best practices. Educate church leaders, pastors, prospects, clients, their advisors, and internal staff about charitable giving, including charitable trusts, financial planning, major gift and estate planning options and techniques.
- Work closely with Foundation Ministry Relations Officers, trust officers, investment officer, legal counsel, and the operations area in all facets of gift, trust, and tax administration.
- Work with church leaders and Pastors on cultivation and soliciting major gift/planned giving prospects.
- Work closely with clients, Presbyterian constituencies, and other interested prospects employing a servant style work ethic to fulfill the reasonable needs of the client and support and enhance the relationship.
- Serve in a technical and advisory role regarding inquiries of gifts and charitable products and services.
- Actively listen and provide thoughtful leadership to clients as they determine the most appropriate plan to meet their charitable giving goals.

QUALIFICATIONS

- Expertise in gift planning and charitable estate planning required, broader knowledge of IRS codes and estate planning preferred.
- College degree required, CPA, CFP® or JD or preferred.
- Fund Raising experience required especially in major gifts and planned giving
- Experience with PG Calc, Microsoft Dynamics and Raiser's Edge
- Five years of experience and thorough knowledge in the areas of charitable gift planning with a focus on major and planned gifts charitable trusts, preferred.
- Good reasoning ability is required to solve a wide range of business problems.
- Able to understand and utilize financial reports and legal documents to conduct business.
- Able to make presentations in front of groups and individual prospects.
- Ability to communicate orally with management, co-workers, and customers both individually and in a group/team. Regular use of the telephone and e-mail for communication is essential.

COMPENSATION AND BENEFITS

The New Covenant Trust Company is prepared to offer a competitive salary in the range of \$80,000 - \$85,000 commensurate with experience and a benefits package that aligns with our corporate values and recognizes the need to have a healthy work-life balance. To that end, our benefits include, but not limited to hybrid work environment, generous PTO policy, a pension and a 401(k). In addition, the Trust Company covers the majority of health insurance premium.

The New Covenant Trust Company is an equal opportunity employer and does not discriminate on the basis of gender, race, age, creed, sexual orientation or any other protected class.

TO APPLY FOR THIS POSITION, CLICK HERE:

<https://ashleyroutree.recruitpro.com/jobs/260408-41699.html>