



## Philanthropic Strategy and Investment Advisor

Position: Regular, Full Time Exempt  
Department: Philanthropic Strategy  
Reports to: Director, Philanthropic Strategy  
Supervises: N/A  
Date Reviewed: October 2024

**Organizational Overview:** Founded in 1914, the Cleveland Foundation (“TCF”) is the world’s first community foundation. Visionary Frederick Goff, a banker and an attorney, was inspired to pool the charitable resources of Clevelanders from all walks of life, both living and deceased, into a single, great, permanent trust administered for the betterment of the community. It was such a good idea that there are currently over 2,000 community foundations worldwide.

Until recently, TCF was grateful to call Playhouse Square home for nearly 40 years. During that time, TCF had the opportunity to play a key role in the community effort to redevelop the theater district and downtown Cleveland. After careful and thoughtful exploration of a wide range of options for a future home, TCF’s board and staff determined that there was an opportunity to play a similar role in the development of a different Cleveland neighborhood.

In the Spring of 2023, TCF moved to Midtown representing an investment in Greater Cleveland’s neighborhoods and a fundamental change in the way it interacted with the community it served. On August 1, 2023, Lillian Kuri made history by becoming the first female President & CEO of TCF, the world’s oldest and one of the largest community foundations with over \$3 billion in assets under management. Lillian is currently leading TCF’s transformation with an innovative strategic plan to shape the “Community Foundation of the Future.” TCF’s vision is “A vibrant Northeast Ohio in which no Clevelander is left behind.”

**Summary:** The Philanthropic Strategy and Investment Advisor role offers an opportunity to join a thriving organization during a pivotal moment in its strategic transformation. They will be positioned as part of the fabric of the Greater Cleveland community and the philanthropic landscape while serving in a mission driven and innovative organization.

The Philanthropic Strategy and Investment Advisor will work within a collaborative fundraising team to build relationships and partnerships with external parties who wish to develop a philanthropic strategy or those that will help their clients and networks learn how they can create their personal charitable legacy.

### **Reporting Relationship:**


The Philanthropic Strategy and Investment Advisor reports to the Director, Philanthropic Strategy, and is an integral part of the Strategy team under the SVP, Philanthropic Strategy and General Counsel.



### **Essential Functions and Expected Outcomes:**

- Interacts daily with external constituents with a primary focus on the cultivation of relationships with professional advisors, corporations, non-profit organizations, individuals, affinity groups and families to establish new funds and/or planned gifts that meet each donor's philanthropic goals and in furtherance of the foundation's philanthropy efforts.
- Provides information and technical assistance to professional advisors and/or their clients, and the foundation's organizational fund partners and donors, regarding current and planned gift opportunities including bequests, CRTs, CLTs, CGAs, and insurance, as well as current gifts of complex assets such as real estate and closely held business interests.
- Collaborates with the Philanthropic Services and Finance Teams to secure new and additional contributions and planned gifts from prospective and existing donors and organizational fund partners.
- Stays current on legal, accounting and investment issues with a particular emphasis on charitable giving, charitable trusts, deferred gifts, tax exempt organizations, private foundations, donor advised funds and supporting organizations.
- Reaches out and represents TCF at community, donor, professional advisor, organizational fund partner, and private foundation fund partner functions.
- Collaborates with cross-departmental teams as needed to enhance TCF's philanthropy activities in support of TCF's strategic plan.
- Executes other duties as assigned by the Director, Philanthropic Strategy and SVP, Philanthropic Strategy and General Counsel.

### **Essential Qualifications, Credentials and Technical Skills required:**

- A bachelor's degree in a relevant field. Master's degree, law degree, CPA, CFP or other similar credentials welcomed.
  - Five to seven years of experience in a high touch service environment focused on providing professional advice and personal service to a diverse range of visible and important clients.
  - Knowledge of fundraising, deferred giving, and philanthropy with the ability to intelligently assist donors and prospects in formulating plans, goals and/or strategies for their philanthropic giving.
  - Proven ability to exercise sound judgment and interact effectively with existing and prospective donors, community leaders, professional advisors and representatives from nonprofit organizations based upon their preferred locations and schedules, including occasional meetings during evenings or weekends.
  - Ability to think creatively and find new and innovative approaches to reaching out to prospects, donors, funders and the community at large. Proactive, takes initiative, and self-
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motivated in managing an ongoing portfolio of prospects with regular and consistent in person meetings.

- Commitment to a donor centric culture, excellent customer service, integrity and ethics.
- High degree of organizational skills and attention to detail. Ability to be flexible, adaptable, and prioritize work effectively and adjust to multiple demands within set deadlines.
- Excellent presentation skills with the ability to educate and persuade audiences.
- Exceptional written communication skills and ability to manage and coordinate multiple projects simultaneously.
- Demonstrated ability to successfully navigate discussion on topics that are potentially sensitive, challenging or could otherwise inspire passionate responses that are different than your own.
- Aligned with TCF values and commitment to fostering a positive office culture. Demonstrated passion for and commitment to diversity/racial equity and inclusion. Experience working as part of a multidisciplinary team and working effectively with persons and communities from diverse cultural, social, and ethnic backgrounds and age groups.
- Proven ability to promote teamwork and collaboration among peers, both cross departmentally and throughout an organization.
- Proficiency in utilizing technology to conduct research, provide information and/or services. Intermediate proficiency in all Microsoft Office programs and working knowledge of database programs.

#### **OUR COMMITMENT TO EQUAL OPPORTUNITY & DIVERSITY, EQUITY, AND INCLUSION:**

The Cleveland Foundation exists to enhance the quality of life for all citizens of Greater Cleveland. The ability to carry out our mission and to foster our commitment to diversity, equity, and inclusion can best be pursued if our workforce, grantees, donors, partners, and governing body are inclusive of individuals of diverse backgrounds, beliefs, and perspectives.

We believe that diversity encompasses, but is not limited to, age, color, education, ethnicity, family or marital status, gender, gender identity or expression, language, national origin, physical and mental abilities or characteristics, political affiliation, race, religion, sexual orientation, socioeconomic status, veteran status, and/or other characteristics that make an individual unique.

The Cleveland Foundation is committed to equal employment opportunities for all, and our policy is to ensure that employees are selected, developed, retained, and promoted based on the individual's ability and job performance, and without regard to that individual's status or characteristics protected by federal, state or local law.

#### **PAY AND BENEFITS:**

The foundation's compensation program will determine the estimated annual salary for this position, which will be fair, consistent with the salaries of comparable positions within the



organization, and reflective of a candidate's educational, professional, and community background and qualifications.

The foundation offers an exceptional benefits package, including medical, dental, vision, identity theft, and life and disability coverage, a comprehensive wellness program, an employee assistance program, a fully vested 403(b) retirement plan, ten paid holidays, and, for exempt positions, 15 days of vacation and 12 sick days, prorated the first year of service based on the date of hire.

**TO APPLY:**

[If you are interested in applying for this position, please submit your resume and cover as soon as possible via this link.](#) This posting will remain active until the position is filled. We regret that we cannot respond personally to each applicant.

**Note:** *Our flexible workplace policy provides one day of remote work per week.*

