

▶ PHILANTHROPIC SOLUTIONS SPECIALIST

 *Remote (Anywhere in the United States)*

POSITION OVERVIEW

The Philanthropic Solutions Specialist helps donors, churches, advisors, and colleagues turn charitable intentions into effective action by providing gift planning expertise, coordinating philanthropic solutions, and connecting people with the resources of the Presbyterian Foundation and New Covenant Trust Company.

MORE INFORMATION

POSTING DATE

09/30/2026

SALARY

\$95,000 - \$100,000

DEPARTMENT

Philanthropic Solutions/Planned Giving

POSTING NUMBER

HR 26-09-07

Forward resume to Yveshia Berthiaume at
Yveshia.Berthiaume@presbyterianfoundation.org

ABOUT US

Since 1799, The Presbyterian Foundation has been dedicated to gathering, stewarding, and distributing funds for mission, deeply rooted in the Reformed values that have guided us for over two centuries. We are committed to strengthening congregations and their related ministries by developing and managing funds on their behalf, fostering communities of generosity among members and constituents. Our services extend to all Presbyterians, offering a variety of giving and investment options to realize philanthropic goals, all while staying true to our faith-driven principles.

Our mission is carried forward by our Senior Staff and Trustees, whose leadership, experience, and faith values embody the dedication to our cause. They are not just stewards of resources but also of the legacy and integrity of The Presbyterian Foundation. As we navigate the future, we remain focused on impacting the world through faith, hope, and generosity, inviting you to join us in this enduring journey of mission and ministry support.

WHY US?

Legacy & Continuity: Since 1799, the Presbyterian Church has upheld a vision of financial stewardship, exemplified by the creation of its oldest endowment in 1821, which continues to support our mission today.

Exceptional Benefits: Enjoy access to a highly affordable health insurance plan, generous vacation time, and a comprehensive benefits package that includes a pension plan.

Positive Work Culture: Experience a workplace that values meaningful work, fosters respect, and maintains a pleasant and supportive environment.

Personal & Professional Growth: Embark on a unique career path within the organization, benefiting from opportunities to broaden your expertise and personal development.

PHILANTHROPIC SOLUTIONS SPECIALIST

JOB DESCRIPTION

Position Summary

The Philanthropic Solutions Specialist helps donors, churches, advisors, and colleagues turn charitable intentions into effective action by providing gift planning expertise, coordinating philanthropic solutions, and connecting people with the resources of the Presbyterian Foundation and New Covenant Trust Company.

Success in this role is defined by three outcomes:

1. Help donors, churches, and other constituents identify effective charitable planning solutions.
2. Using professional expertise, help charitable gifts successfully navigate the path from idea to implementation.
3. Increase the charitable gift planning capacity of the Foundation, NCTC, and the wider church.

This position requires a collegial, servant-leader approach characterized by collaboration, relationship building, and a commitment to organizational values.

Scope & Breadth of Position

This position reports to the Vice President of Philanthropic Solutions and has no direct reports.

Essential Job Accountabilities

1. Provide Philanthropic Planning Expertise

Serve as a charitable gift planning resource for donors, churches, advisors, and colleagues. Help constituents evaluate and implement charitable giving strategies that align with their values, philanthropic goals, and ministry objectives. Maintain expertise, provide information to donors in charitable gift planning techniques, philanthropic trends, tax law developments, and best practices.

2. Advance Charitable Gift Opportunities

Collaborate with Ministry Relations Officers, NCTC, Operations, Legal, and other internal and external partners to move charitable opportunities from inquiry through implementation. Provide technical guidance in collaboration with other trusted advisors (e.g. financial, tax, legal), coordinate appropriate resources, and help remove obstacles that impede donor opportunities.

3. Grow Organizational Philanthropic Capacity

Increase awareness and utilization of charitable planning opportunities through education, training, communications, and thought leadership. Develop resources and programming that equip donors, churches, and staff to engage more effectively in charitable gift planning and stewardship.

Major Duties and Responsibilities

Philanthropic Planning & Donor Consultation

- Consult with donors, churches, and advisors regarding charitable giving opportunities and strategies.
- Educate constituents regarding charitable gift planning vehicles, tax-wise giving strategies, philanthropic trends, and Foundation/NCTC services.
- Prepare gift illustrations, planning scenarios, and related materials.
- Serve as a trusted technical resource to Foundation and NCTC staff.

Gift Advancement & Coordination

- Support Ministry Relations Officers in advancing charitable gift opportunities, and support Operations staff with new and existing gifts.
- Coordinate with internal departments and external advisors to facilitate implementation of charitable gifts and philanthropic strategies.
- Assist with gift acceptance matters, trust planning opportunities, donor advised funds, life-income gifts, complex assets, permanent funds, and related transactions.
- Identify and recommend improvements to systems, processes, and collaboration that enhance donor service and gift completion.

Education & Capacity Building

- Provide ongoing learning opportunities for internal staff, church leaders, stewardship directors, and donors.
- With the guidance of the VP of Philanthropic Solutions, and in partnership with Marketing &



- Communications, promote charitable planning opportunities and philanthropic solutions.
- Support long-term donor engagement and stewardship efforts that strengthen relationships with the Foundation and NCTC.

Experience and Job-Related Requirements

- College degree required in business/finance/accounting/law or related field, credentials and certifications are a plus including, but not limited to: CFP®, CAP®, CPA, CSPGCM, CFRE, FCEP, JD.
- Donor engagement experience required, five years of experience and thorough knowledge in the areas of charitable gift planning with a focus on major and planned gifts and charitable trusts preferred.
- Proficiency in gift planning considerations, e.g. finance, tax, or estate planning options and regulations.
- Professional interpersonal skills inclusive of excellent oral and written communication.
- Good reasoning ability is required to solve a wide range of business problems.
- Ability to apply statistical and mathematical calculations required.
- Able to understand and utilize financial reports and legal documents to conduct business.
- Able to make presentations in front of groups and individual prospects.

Physical Requirements

- Ability to communicate orally with management, co-workers, and other constituencies both individually and in a group/team. Regular use of the telephone and e-mail for communication is essential.
- Sitting for extended periods is common.
- Hearing and vision within normal ranges are essential for normal conversations, to receive financial information and to prepare or inspect documents.
- No heavy lifting is expected. Exertion of up to 30 lbs. of force occasionally may be required.
- Good manual dexterity for the use of common office equipment, such as computer terminals, calculator, telephone, and copiers.
- Ability to travel as needed.
- Regular transport of a suitcase and laptop will be required.

Work Environment

- Many of the duties are performed indoors in a traditional office setting.
- Activities include extended periods of sitting and extensive work at a computer monitor, communicating over the telephone, or using e-mail and/or calculator. Includes occasional travel to meet donors and prospects, visit churches, attend meetings, or participate in conferences.
- Remote or local are both options.

“The Presbyterian Foundation is an Equal Opportunity Employer”

The Presbyterian Church (U.S.A.) Foundation, along with its subsidiary New Covenant Trust Company (NCTC), are Equal Opportunity Employers. We provide equal opportunities in all employment positions, regardless of age (as defined in the Age Discrimination in Employment Act), disability, sex, national origin, race, color, creed, religion, sexual orientation, gender identity, gender expression, or veteran status.

