



## SAN ANTONIO AREA FOUNDATION JOB DESCRIPTION

<b>DEPARTMENT</b> Development and Donor Services	<b>TITLE</b> Wealth Advisor Relations Manager	<b>REPORTS TO</b> Exec. Dir, Development and Donor Services
<b>DATE REVISED</b> February 2024	<b>DATE EFFECTIVE</b> February 2024	<b>EXEMPT or NON-EXEMPT</b> Exempt

### THE AREA FOUNDATION

The San Antonio Area Foundation has served as the sole, designated community foundation for the San Antonio area for sixty years, growing to become one of the Top 20 foundations in the nation based on asset size. The Area Foundation serves as the community's most trusted and impactful philanthropic partner, managing more than 600 charitable funds totaling \$1.3 billion in assets. Coordinating efforts with numerous area nonprofits, the Area Foundation serves as a collaborative leader, connecting donors to address key community issues and investing in our future. Since 1964, over \$800 million for scholarships and grants have been awarded to close opportunity gaps for those who need it most in San Antonio. Learn more about your community foundation at [saafdn.org](http://saafdn.org)

**Our core values are Excellence, Passion, Integrity, and Community.**

### SUMMARY OF RESPONSIBILITIES

As a member of the Development and Donor Services team, this position is responsible for developing and implementing a plan for increasing awareness of the San Antonio Area Foundation among financial planners, investment advisors, estate attorneys, CPAs and the broader community. This position will have shared responsibility for working in partnership with professional advisors to establish new charitable funds at the Area Foundation on behalf of their clients who could be individuals, businesses, foundations, and families. This position is expected to manage and expand a portfolio of contacts through effective stewardship, communications, events and community presentations.

### COMPETENCIES/SKILLS

- Must adhere to Core Values
- Excellent interpersonal and communications skills, both oral and written
- Strong customer service and the ability to work with people of all backgrounds and ethnicities.
- The ability to guide and lead groups of volunteers and to motivate others.
- Excellent written and verbal communication.
- Strong computer skills in word processing database programs
- Self-motivation, high energy, sense of humor, creativity and an appreciation of the role of philanthropy in the community

### QUALIFICATIONS

- 2 years in related field such as wealth management, financial services, financial advisory, etc.
- BA bachelor's degree in finance, economics, business administration or a related field preferred



- Proficiency with computers, including knowledge and active use of relational database software, Foundation/Community Suite experience preferred.

## **TASKS/FUNCTIONS**

### **Asset Growth**

- Meets with professional advisors in community and region to build partnerships and promote Area Foundation as the most trusted and impactful conduit for clients' philanthropic goals.
- Initiates and completes both the opening of new funds and outright gifts to the community foundation's strategic initiatives and unrestricted funds.
- Coordinates with the donor services and donor engagement teams to ensure smooth stewardship transitions for our newest donors.
- Maintains a portfolio of professional advisors for continued engagement and stewardship.
- In partnership with team, develops and implements a plan for increasing awareness of the Area Foundation among prospective advisors, including marketing collateral and events strategy.
- Actively seek opportunities for the Area Foundation to make community presentations and work closely with staff. Must be able to make presentations on behalf of the Area Foundation.

### **Data Management**

- Identify and track prospects for new professional advisors for relationship building.
- Manage database records for professional advisors.
- In partnership with the Exec Dir, Development and Donor Services, establish a system to track and record contacts.
- Actively participate in the creation of individual goals and strategies.

## **PHYSICAL DEMANDS / WORKING CONDITIONS**

The physical demands and characteristics of the work environment described here are representative of those occurring in the performance of the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The employee occasionally may lift and move up to 40 pounds. Ability to travel throughout the Area Foundation's service area and to work some evenings and weekends.

**The San Antonio Area Foundation is an Equal Opportunity Employer.**

Please send cover letter and resumes to [lgiacomoni@saafdn.org](mailto:lgiacomoni@saafdn.org).