

# RAYMOND JAMES<sup>MD</sup>

## PHILANTHROPIC ADVISOR

Vancouver, BC or Toronto, ON

Job Posting # 21-133

Raymond James Ltd (RJL) & the Raymond James Canada Foundation (RJCF) are currently seeking an experienced Philanthropic Advisor to join our team working from our Vancouver BC or Toronto ON offices.

Raymond James Ltd. is Canada's leading independent investment dealer offering high quality investment products and services to Canadians seeking customized solutions to their wealth management needs.

The Raymond James Canada Foundation (RJCF) works with RJL Financial Advisors and their high net worth (HNW) clients to meet both their financial and philanthropic goals. Our Charitable Giving Program simplifies strategic giving, so that our clients can focus on what matters most.

Reporting to the Vice-President & Executive Director of the Raymond James Canada Foundation, the Philanthropic Advisor will work in collaboration with Financial Advisors, as well as our trust, financial planning, and insurance divisions to deliver professional gift planning advice to high net worth clients. The Philanthropic Advisor in an internal role focused on building lasting relationships with Advisors and their clients, and helping them navigate through the philanthropic process: from initial conversations discovering their values, passions, and objectives, to developing an understanding their unique and complex tax needs, and finally creating and executing sophisticated, strategic, and long-term giving plans.

Our ideal candidate is a skilled relationship manager with significant experience in both professional gift planning and wealth management. You will be familiar with all elements of charitable giving, including major, annual, and estate gifts, granting program evaluation, tax and estate planning, and donor stewardship. You have an extensive background in the financial sector, either in a technical or client-facing role. Ideally, you have technical experience in securing major gifts and processing donations of securities in-kind, insurance, or estate gifts.

### Specifically you will:

- Work with Raymond James Ltd Financial Advisors and their existing and potential clients to develop and executing sophisticated, strategic, and long-term giving plans to meet their philanthropic and financial goals;
- Educate RJL Financial Advisors and their clients on the benefits of the RJCF Charitable Giving Program, and offer comprehensive knowledge of the charitable landscape in Canada, including private foundations, public foundations, and other donor advised fund programs;
- Facilitate in-depth discovery conversations with Advisors and their clients to clarify their interests, values, and philanthropic objectives, as well as their unique and complex wealth management needs;
- Collaborate with FAs, tax planners, lawyers, and other external consultants for the benefit of the client;
- Assist the Executive Director in establishing business development goals as they relate to new accounts, AUA, and program growth;
- Conduct webinars and in person presentations to enhance the knowledge and understanding of the RJCF Charitable Giving Program offering to our internal and external partners;



- Develop and deliver advisor focused learning opportunities on incorporating philanthropy into their practice;
- Create and deliver personalized client-facing presentations;
- Be responsible for the delivery of timely, accurate and professional administration of charitable gifts from CGFs;
- Proactively identify and resolve CGF issues while adhering to all internal policies and procedures; and
- Other duties and projects as assigned.

**To qualify for this opportunity, you possess:**

- Professional experience in planned/estate giving, including major, annual, and estate gifts, granting program evaluation, tax and estate planning, and donor stewardship;
- Experience in the financial sector (tax, estate, insurance or investments);
- Completion of the CSC within 12 months of hire;
- Technical proficiency related to financial planning strategies such as insurance, philanthropy and taxation;
- Experience working with HNW clients and their wealth advisors;
- Degree or diploma, preferably in the fields of finance, business, law, or philanthropy;
- One or more current or previous: STEP, MTI, CFP, CPA, CFRE, LLQP are all an asset;
- Well-developed interpersonal skills and the ability to handle confidential information with tact and discretion;
- Ability to organize, manage and track multiple detailed tasks and assignments with frequently changing priorities in a fast-paced work environment;
- Excellent proficiency with MS Office including Word, Excel, Outlook, PowerPoint, as well as web based communications systems (Zoom);
- Broad knowledge of and experience in using CRM systems;
- Exceptional client service skills;
- Excellent written and oral communications skills;
- Excellent critical thinking, analytical, and decision-making skills;
- Proactive thinking and excellent problem solving abilities;
- Ability to work effectively both independently and within a team environment;
- Strong time-management, multi-tasking and prioritizing skills;
- Willingness and ability to fulfill continuing education requirements;
- Willingness and ability to travel within Canada on occasions;
- Flexibility and willingness to assist others as required; and a
- Friendly and professional demeanor.

This is a permanent full-time position with a competitive compensation and benefits package.

If you would like to join our team, please send a resume and covering letter, **quoting the position and Job Posting # 21-133 at the soonest:**

To:  
Human Resources  
Raymond James Ltd.  
Email: [resumes@raymondjames.ca](mailto:resumes@raymondjames.ca)

To be considered for employment candidates will be required to provide proof of citizenship, permanent residency or eligibility to work in Canada with no restrictions. We require applicants to complete a background verification process prior to commencing employment with the company, including but not limited to a credit and criminal record check. Employment is contingent on the satisfactory completion of a pre-employment background check.



We sincerely thank all applicants who express an interest in this role: only those being directly considered will be contacted.

Raymond James Ltd. recognizes the value of a diverse workforce and appreciates the unique skills and special contribution of each employee. We are committed to accessibility for candidates through all stages of the recruitment process. Should you require accommodation, please contact Human Resources via email at [resumes@raymondjames.ca](mailto:resumes@raymondjames.ca).

