

GIVECLEAR FOUNDATION CANADA

JOB DESCRIPTION – Director of Sales, Financial Relations

DOCUMENT OVERVIEW: The Director of Sales, Financial Relations (the “Director”) will take the lead in developing new business growth through sales and tech product development in the Wealth Management space. This director reports directly to the Executive Director and works to fulfill the GiveClear Foundation Canada (“GCFC”) Mission and Vision:

Vision: A new model of philanthropy - a transparent system at your fingertips connecting people to trusted charities at scale - empowering people of any means to give and support effective change.

Mission: To deliver an inspiring charitable giving experience through innovative technology, bringing additional accountability, transparency and effectiveness to philanthropy.

For more information on our organization, please visit www.giveclear.ca

A. ROLES & RESPONSIBILITIES

1. Business Growth (50%)

- Establishes and expands a new line of business (Generosity in Wealth) by building relationships with financial advisors and their respective offices in both Boutique and National Wealth Management Firms, gathering charitable assets in Donor Advised Funds (DAFs)
- Educates financial professionals in the advantages of including charitable giving into conversations with their clients
- Develops a business plan for Generosity in Wealth
- Resells the Charity Advisory platform into Boutique Management Offices
- Liaises with technology providers’ sales team on relationships with Major Financial Institutions

2. Product Development (25%)

- Takes the lead of Project Manager in Generosity in Wealth, working with the technology team to identify pain points for Wealth Advisors in the DAF space
- Defines the functional specifications for Charity Advisor in shaping a Minimal Viable Product,
- Expands Charity Advisor product to the eventual buildout of a DAF in a Box, with plug and play functionality for Wealth Management offices and oversees the sales and integration processes.
- Ensures simplicity and flexibility in the program to streamline giving, while providing transparency and accountability into donors’ grants

3. Organizational Mission and Strategy: (15%)

- Educate donors on responsible charity and impact investing
- Integrate socially responsible investing into GiveClear's Investment Policy Statement and investment pool offerings
- Engage the board finance, audit, and investment committees around issues, trends, and changes in the operating model(s) and operational delivery

4. Governance and Compliance (10%)

- Ensures compliance with the Finance Policies and risk guidelines, working with the Investment Committee of the Governing Board
- Manages and tracks the performance of GiveClear Foundation's Donor Advised Funds and General Funds in keeping with the policies and investment guidelines established by the investment committee and engaging outside consultants (auditors, investment advisors)
- Ensures that all funds meet the minimum giving quota of 3.5%, and that the distribution stream meets with overall goals of GCFC (17%), aligns with the donor intent and serves the beneficiary in a charitable manner

B. QUALIFICATIONS

- Generous in personal practice with an ability to be an ambassador for transparent, effective and efficient charitable giving.
- Strong written and oral communication skills with ability to convey GiveClear Foundation's strategic vision to stakeholders
- Strong financial and business acumen with previous experience in strategic planning and execution
- Ability to build rapport relating as a peer among various stakeholders to including financial professionals, funding partners and financial institutions
- Demonstrates ability to build a strong team and focus the team on the execution of the strategic plan
- Works with a collaborative spirit within the team
- Exemplifies integrity and high ethical standards
- Ability to balance innovation with structure

C. EDUCATION

- Previous Business Experience in Financial Sector
- Five or more years senior management experience

How To Apply:

- Please forward application to admin@giveclear.ca