Regional Development & Relationship Manager
Western Canada

Canada Gives was established in 2005 as a national donor advised fund (DAF) sponsor, and has highly valued relationships with advisors and major donors across Canada and particularly in the Western provinces. We are seeking a Regional Development & Relationship Manager to support, expand and build our services within the region.

Position Overview

The purpose of the Donor Advised Fund ***Regional Development & Relationship Manager*** position is to build and seek new relationships with financial industry advisors and portfolio managers as well as other professional advisors who wish to add charitable giving solutions to their practice, and support their HNW and UHNW clients and business owners.

The primary focus of the role is to promote the range of services and solutions for charitable giving using donor-advised funds /foundation accounts offered by Canada Gives. By providing support to professional and financial advisors as they develop charitable gifting strategies, this position will work to align the needs of the Advisor with Canada Gives' turnkey and customized services.

Responsibilities

- Market Canada Gives donor-advised funds as a flexible option to a private foundation to advisors such as wealth management firms, portfolio managers, accountants, lawyers, family offices and insurance specialists
- Deliver compelling presentations to a variety of audiences on the benefits of using donor-advised funds/foundation accounts and clearly differentiating the value proposition offered by Canada Gives
- Encourage advisors to include philanthropy in their practice, and assist them with gifting ideas and strategies so they can offer tax and estate planning services that include large charitable gifts

- Provide sales support to advisors to increase their comfort in initiating philanthropic conversations to clients
- Nurture existing advisor and donor-advised fund client relationships.
- Participate in weekly staff meetings and collaborative client services discussions
- Provide regular sales reports and marketing updates

Core Competencies

- Excellent communication and presentation skills
- Familiarity with tax and estate planning and/or planned giving strategies
- Understanding the private client culture in financial services
- Collaborative within the organization
- Philanthropic Advisory experience or similar skills

Qualifications

- Post-secondary education in finance, business or a related field;
- Minimum 5 – 7 years in business development role in financial services
- Knowledgeable about investment industry and specifically the private client sector
- Understanding of the not for profit sector, foundations and endowments
- Some technical ability in tax and/or estate planning
- Exceptional presentation and communication skills
- MFA-P designation (Master Financial Advisor in Philanthropy) is a significant asset.

CONTACT:

If you wish to submit a resume or want more information on this position, please reply to inquiry@canadagives.ca or contact Hali Van Vliet at hvanvliet@bdo.com.