



Manager, Professional Advisor Relations

JOB POSTING

POSTED: October 21, 2026

ABOUT THE INLAND EMPIRE COMMUNITY FOUNDATION

Established in 1941, IECF stands as the oldest community foundation in the Inland Empire, dedicated to serving Riverside and San Bernardino Counties. With a mission rooted in fostering racial, gender, and economic equity, the foundation has become a transformative force in our communities. Stewarding more than \$168 million in assets, IECF collaborates with donors of all sizes to channel more than \$21 million in gifts and distribute over \$25 million in grants and scholarships. The foundation places a strong emphasis on using data to unveil disparities, driving its grantmaking, programs, and partnerships. By empowering and investing in the most affected communities and cultivating a culture of philanthropy, IECF envisions a future marked by positive, transformative, and community-led change. As IECF expands its impact, we are seeking a Manager, Professional Advisor Relations, who will play a vital role in strengthening the Charitable Giving Team on this journey.

JOB SUMMARY

The Manager, Professional Advisor Relations, will develop and manage IECF's professional advisor engagement strategy by cultivating relationships with attorneys, CPAs, financial advisors, wealth managers, trust officers, insurance professionals, and related intermediaries.

The position serves as a bridge between professional advisors, donors, and IECF staff, helping advisors identify charitable solutions that align with their clients' financial, estate-planning, and philanthropic objectives.

A key responsibility will be building and maintaining a segmented advisor database, implementing an annual advisor engagement calendar, facilitating charitable gift planning education, and supporting the development of charitable funds, planned gifts, and other philanthropic opportunities.

Collaborating with donor services, charitable giving officers, development professionals, and Foundation leadership, the Manager will help position IECF as a preferred charitable planning partner throughout the Inland Empire.

KEY RESPONSIBILITIES

1. Professional Advisor Relationship Development

The successful candidate will:

- Build and maintain strong relationships with professional advisors throughout Riverside and San Bernardino Counties.
 - Expand IECF's visibility and credibility within the professional advisor community.
 - Develop and implement individualized engagement strategies for key advisors, firms, and professional associations.
 - Conduct outreach meetings, presentations, and relationship-building activities.
 - Identify and cultivate advisor champions who can serve as ambassadors and advocates for IECF.
 - Represent IECF at professional associations, conferences, networking events, and community programs.
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2. Advisor Database Management & Market Intelligence

Responsibilities include:

- Building and maintaining a comprehensive advisor database within IECF's CRM system.
 - Segmenting advisors by profession, geography, firm, specialty, and relationship stage.
 - Tracking engagement activities, referrals, educational participation, and philanthropic opportunities.
 - Identifying influential firms, emerging advisor networks, and underserved geographic markets.
 - Using data and analytics to support strategic outreach and relationship development efforts.
 - Generating reports and insights to inform engagement priorities and resource allocation.
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3. Charitable Gift Planning Education

The Manager will serve as a resource to professional advisors by:

- Promoting understanding of charitable giving strategies and community foundation services.
- Coordinating educational programs on:
 - Planned giving
 - Bequest and beneficiary designations
 - Charitable trusts
 - Gifts of appreciated assets
 - Retirement assets
 - Business interests
 - Donor-advised funds
 - Endowment giving
- Developing educational materials, presentations, guides, and case studies.
- Providing advisors with timely information regarding IECF services, funds, and gift acceptance policies.

- Coordinating with qualified legal, tax, and financial professionals when specialized expertise is needed.

This position does not provide legal, tax, or investment advice.

4. Professional Advisor Engagement & Events

This role will lead the planning and execution of an annual advisor engagement strategy, including:

- Educational seminars and workshops.
- Continuing education opportunities where appropriate.
- Advisor roundtables and networking events.
- Small-group briefings and leadership discussions.
- One-on-one advisor meetings.
- Advisor appreciation and engagement events.

Additional responsibilities include:

- Recruiting speakers and subject-matter experts.
 - Coordinating event logistics and communications.
 - Evaluating participation and outcomes.
 - Collaborating with marketing, donor services, charitable giving, and community impact teams.
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5. Charitable Gift Development & Collaboration

Working collaboratively across the organization, the Manager will:

- Identify opportunities for advisors to introduce clients to IECF.
- Facilitate conversations among advisors, donors, families, and Foundation staff.
- Support charitable planning discussions and philanthropic strategy development.
- Help identify opportunities for:
 - New charitable funds
 - Planned gifts
 - Complex asset gifts
 - Donor-advised funds
 - Endowment gifts
 - Other philanthropic commitments
- Coordinate with Donor Services regarding gift administration and fund establishment.
- Support stewardship efforts through timely follow-up, educational resources, and impact reporting.

QUALIFICATIONS

Education & Experience

Preferred candidates will possess:

- Bachelor's degree in business, finance, communications, nonprofit management, philanthropy, or related field, or equivalent professional experience.
 - Five or more years of progressively responsible experience in:
 - Professional advisor relations
 - Business development
 - Financial services
 - Planned giving
 - Philanthropy
 - Nonprofit fundraising and development
 - Demonstrated success building strategic professional relationships and referral networks.
 - Experience planning educational programs and professional events.
 - Experience utilizing CRM systems, contact segmentation, and performance reporting.
 - Familiarity with charitable planning, donor-advised funds, estate planning concepts, and community foundations.
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Knowledge, Skills & Abilities

The ideal candidate will demonstrate:

- Exceptional relationship building and networking skills.
 - Strong presentation and public speaking abilities.
 - Excellent written and verbal communication skills.
 - Confidence engaging with attorneys, CPAs, financial advisors, wealth managers, and trust professionals.
 - Strong project management and organizational abilities.
 - Ability to communicate complex charitable planning concepts clearly and effectively.
 - Experience with CRM systems, database management, and reporting.
 - High levels of professionalism, discretion, and confidentiality.
 - Ability to collaborate effectively across departments and stakeholder groups.
 - Commitment to IECF's mission and values.
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Preferred Professional Credentials

Professional certifications are valued but not required. Examples include:

- Certified Financial Planner (CFP)
- Chartered Advisor in Philanthropy (CAP)
- Certified Specialist in Planned Giving (CSPG)
- Certified Trust and Fiduciary Advisor (CTFA)
- Certified Wealth Strategist (CWS)

Equivalent experience and demonstrated expertise will be given full consideration.

COMPENSATION

Compensation will be commensurate with skill level and experience with an annual performance and salary review; anticipated hiring salary range for this position is **\$95,000-\$115,000** based on proven experience meeting the qualifications in this job announcement.

EEO STATEMENT

Inland Empire Community Foundation is an equal opportunity employer and makes employment decisions based on merit. The company will not discriminate on the basis of race, religion (including religious dress and grooming practices), color, sex (including pregnancy, childbirth, breastfeeding and/or related medical conditions), sexual orientation, national origin (including language use restrictions), ancestry, citizenship status, uniformed service member or veteran status, marital status, age, medical condition (genetic characteristics, cancer related), physical or mental disability (including HIV and AIDS), gender, gender identity, or gender expression. It also includes a perception that anyone may have any of those characteristics or is associated with a person who has or is perceived as having any of those characteristics. All such discrimination is unlawful.

HOW TO APPLY

To apply for the Manager, Professional Advisor Relations position, please submit a cover letter describing your qualifications, relevant experience, and passion for the role, along with your resume, to **Maite Gracian** at mgracian@iegives.org. The position will remain open until filled. Applicants are encouraged to visit iegives.org/about/iecf-overview/#job-opportunities to confirm that the position is still accepting applications.

For questions regarding the position, please contact **Paula Myles, Director of Donor Services**, at pmyles@iegives.org.

To learn more about the Inland Empire Community Foundation, please go to www.iegives.org.