

**Director of Client Relations**  
**Job Description**  
**May 29, 2018**



**General Description:**

Reporting to the Director of Ministry Services, this position is responsible for cultivating relationships with prospective clients and nurturing relationships with existing clients of the United Methodist Foundation of Western North Carolina, Inc. Primary areas of emphasis include the UMF managed fund options, the UMF Development Fund, Endowment Planning and Planned Giving. The ultimate goal is an increase in total assets and enhanced client relationships in these areas. Frequent travel is a necessary component of this position's work; this includes evenings and occasional weekend travel.

**Responsibilities (include but are not limited to):**

- Working with Churches and Church-Related Institutions to be the best stewards of their funds. This will include presentations on: Fund management, Endowment Planning, and Planned Giving.
- This position will be responsible for cultivating and growing relationships with existing clients, as well as identifying and securing new client relationships.
- Working with Churches, Church-Related Institutions and Individual Donors as appropriate to educate about and encourage planned giving.
- Attend Annual Conference and interact with clients and potential clients.
- Other responsibilities/duties as determined by the Director of Ministry Services.

**Qualifications:**

- Bachelor's degree
- 5+ years of experience and/or direct knowledge of church ministries or similar nonprofits
- Computer skills – ability to effectively use general Microsoft programs; i.e., Word, Excel, Outlook, Publisher, PowerPoint. Proficiency in CRM software, Crescendo or other planned giving programs is desired
- Excellent communication skills - ability to converse with financial planners/advisors, tax attorneys, clergypersons, and CPAs

**Preferred Qualifications:**

- Master's degree in Business, Finance, Nonprofit Management or similar discipline
- Experience and/or general knowledge related to planned giving
- Knowledge, ability and/or desire to stay abreast of taxation law and estate planning techniques through continuing education events
- Demonstrated passion for nonprofit work

To apply: Completed applications, including a cover letter, resume and three professional references, should be emailed to Janey Wooliever at [jwooliever@umfwnc.org](mailto:jwooliever@umfwnc.org) and include the title of position being applied for in the subject line. **Incomplete applications (missing any of the three required elements) will not be considered.** All applicants will be notified of application receipt and final decision.