



Job Title: Managing Director
Supervisor: Senior Managing Director, West
Supervises: N/A
Position Type: Exempt
Location: California
Date: 12/28/21

What We Do

Foundation Source helps people and companies make a difference in the world with their private foundation giving

Overview of Position

Foundation Source is seeking an experienced, energetic, motivated sales managing director to help drive our strategic vision in the California market. You will join as we dynamically leverage our technology and services for private foundations to grow our business. As managing director, you will represent Foundation Source and its offerings to attorneys, CPAs and family offices and their high net worth families and foundation leaders. You will be responsible for building and maintaining strong relationships with the current and new centers of influence in the legal, accounting and family office space to advance business opportunities with emerging or established private foundations. To accomplish this, you will hold meetings (in-person and virtual), conduct webinars, do public speaking, build awareness, and deepen relationships. You will be fluent in private foundations and our value proposition and be expert in discussing our services and providing platform demos. Using a consultative approach while being a true "hunter," you will identify prospects and generate leads. An inside sales team will also generate leads from marketing-driven campaigns and inside sales-led outbound activities. Ultimately, the Managing Director owns the sales process from qualified lead through engagement, collaborating with internal subject matter experts, and working closely with client services to ensure a successful customer journey from sales to service.

The Managing Director is a member of the West Team, which is led by a senior managing director and includes two Directors of Business Development.

Essential Responsibilities

The managing director, to be based in California, is responsible for securing new business from legal, accounting, and family office professionals in California.

- Execute on Sales and firm-wide initiatives
- Meet or exceed individual production goals
- Contribute to regional team goals
- Grow your knowledge of the philanthropic sector and private, non-operating foundations
- Serve as the primary contact for developing business and broadening our reach with legal, accounting, and family office professionals in California
- Establish Foundation Source as a resource for guidance, education, and service in the private foundation sector among the prioritized centers of influence
- Build and enhance Foundation Source's public profile at events, speaking engagements, webinars, presentations, etc.
- Represent our value proposition and position our cloud-based platform, services, and fees to ensure clarity in offering
- Maintain positive and trust-based relations with influencers, stakeholders and decision-makers
- Drive deeper relationships with referral sources
- Develop, in concert with West team, a productive working relationship with Strategic Alliances firms and nurture connections to firms' specialists such as advanced planners, wealth management consultants, and philanthropic specialists
- Collaborate with stakeholders (external and internal) to stage and follow-up on territory events, networking gatherings, or education sessions for existing clients, new prospects, and centers of influence
- Work closely with Business Development Representatives on coordinated lead generation efforts and actively work qualified leads
- Share best practices and partner closely with the Sales team on success stories and strategies for increasing business
- Use Salesforce.com and to capture all sales activity with accuracy and timeliness
- Establish and manage sales cadence for a high-performance practice that effectively progresses opportunities through the sales funnel stages
- Capture all Discovery to inform proposals and align contracting



Key Qualifications

- At least 10 years of experience in Law, Accounting, Family Offices, Sales, Financial Services (or a combination of experience in these practices)
- Proven track record of delivering sales results
- Critical and strategic thinker who can also focus on details
- Versed in a consultative sales approach
- Excellent verbal and written communication skills
- Strong planning, organization, and time management skills
- Independent and results-driven yet a team contributor
- Tech-savvy
- Located in California
- Ability to maintain a home office
- Travel (per state, federal or corporate guidelines to maintain health and safety during COVID or any other crises)
- Experience in any of the following fields is highly preferred: Philanthropy, Private Foundations, Tax and Estate Planning, or Accounting
- Bachelor's Degree required, Advanced degree Preferred

About Foundation Source

Foundation Source is America's leading provider of support services for private foundations—from set-up and administration to high-level philanthropic advisory services. The Company's full suite of back-office, online, and advisory services helps its foundation clients ease the administrative burden, engage board and family members, and deliver greater social impact.

Foundation Source's client base of foundations created and operated by high-net-worth and ultra-high-net-worth individuals and families has grown significantly over the years due to its innovative product offering and strong focus on philanthropy within the market. Today, Foundation Source serves over 1,600 private foundations nationally representing almost \$15 billion in assets under administration. The Company is headquartered in Fairfield, CT.

Physical Demands and Work Environment

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the functions. While performing the duties of this position, the employee is regularly required to talk or hear.

The employee frequently is required to use hands or fingers, handle or feel objects, tools, or controls. The employee is occasionally required to stand; walk; sit; and reach with hands and arms. The employee must occasionally lift and/or move up to 15 pounds. Specific vision abilities required by this position include close vision, distance vision, and the ability to adjust focus. The noise level in the work environment is usually low to moderate.

Note

This job description in no way states or implies that these are the only duties to be performed by the employee(s) incumbent in this position. Employees will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments. All duties and responsibilities are essential functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. To perform this job successfully, the incumbents will possess the skills, aptitudes, and abilities to perform each duty proficiently. Some requirements may exclude individuals who pose a direct threat or significant risk to the health or safety of themselves or others. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities. This document does not create an employment contract, implied or otherwise, other than an "at will" relationship.

The company is an Equal Opportunity Employer, drug free workplace, and complies with ADA regulations as applicable.