

Community  
Foundation  
for Greater Atlanta



## Director, Philanthropic and General Counsel Atlanta, GA

**DRi Waterstone**  
HUMAN CAPITAL

DRiWaterstone Human Capital  
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## Increasing Equity and Shared Prosperity Across the Region

The Community Foundation for Greater Atlanta is a leading nonprofit organization committed to fostering positive change and sustainable impact in the Greater Atlanta region. Guided by the belief that a thriving community relies on strategic philanthropy, the Foundation works closely with donors, nonprofits, and community partners to address critical challenges, advance social equity, and improve the quality of life for all residents.

The Community Foundation for Greater Atlanta focuses on addressing various community needs such as education, health, arts and culture, environment, and social services. They work to mobilize resources and create collaborations to make a positive and lasting impact on the region they serve.



Learn more about TogetherATL here: <https://cfgreateratlanta.org/togetherat/>

## The Community Foundation for Greater Atlanta does three things:

1

Work with and for our community

2

Partner with donors and nonprofits to better Atlanta

3

Steward resources for racial equity and shared prosperity



## The Impact of Community Foundation for Greater Atlanta

### Working With and in Service of the Greater Atlanta Community

- 1. Philanthropic Leadership:** The Foundation plays a crucial role in guiding strategic philanthropy in the region. By providing expert counsel to donors and facilitating charitable giving, the Foundation has helped direct resources toward critical community needs and fostered a culture of giving back.
- 2. Community Investments:** Through its grantmaking programs, the Community Foundation for Greater Atlanta has supported numerous nonprofits and community initiatives. These grants have funded projects spanning a wide range of areas, such as education, health, housing, arts and culture, social services, and environmental conservation.
- 3. Nonprofit Capacity Building:** Beyond financial support, the Foundation has offered training, technical assistance, and capacity-building programs to strengthen the effectiveness and sustainability of local nonprofits. This approach enhances the overall impact of these organizations and helps build a stronger social sector in the region.
- 4. Social Equity and Inclusion:** The Foundation has actively worked to address social disparities and advance equity in the Greater Atlanta area. By prioritizing initiatives that target underserved communities, the Foundation seeks to create a more equitable and inclusive region for all residents.
- 5. Collaborative Partnerships:** The Community Foundation for Greater Atlanta fosters collaboration among various stakeholders, including businesses, government entities, nonprofits, and philanthropists. By facilitating partnerships, the Foundation maximizes the collective impact of diverse organizations working together to tackle community challenges.
- 6. Scholarship Programs:** The Foundation has also invested in education through scholarships, supporting students' pursuit of higher education and fostering future community leaders.



# The Opportunity

The Community Foundation for Greater Atlanta is seeking an experienced and visionary Director, Philanthropic and General Counsel to serve as the Foundation's lead counsel, providing legal advice and support to the organization, with special emphasis on legal matters related to charitable giving and general community foundation law, and serve as a technical advisor with prospects, donors and professional advisors.

The successful candidate will play a key role in overseeing all legal matters, ensuring compliance with applicable rules and regulations, strategically guiding philanthropic initiatives, and supporting meaningful relationships with professional advisors and donors. As Director, Philanthropic and General Counsel, you will establish a legal office that handles all legal matters (coordinating with outside counsel as needed), oversee supporting organizations, provide technical assistance to both advisors and donors in charitable gift planning, and handle all gifts of complex assets.

## Responsibilities include:

### Legal Counsel:

- Participate in the formation of strategic charitable initiatives and partnerships, particularly as to the legal structure. Draft legal agreements related to these matters and other charitable gifts, as well as fiscal sponsorships and fiscal agency arrangements.
- Stay abreast of legislative proposals and changes related to community foundations, charitable giving, trusts and estates, and tax law.
- Provide in-house expertise on the laws governing community foundations and charitable giving - answer questions from across the organization, update and maintain internal policies and procedures, review grant agreements and other matters.
- Oversee supporting organizations affiliated with the Foundation.
- Act as Secretary to the Board of the Foundation, attend Board meetings, advise on Board governance questions, and ensure proper corporate records are produced and retained.

### Professional Advisor Services:

- Provide technical guidance and expertise to professional advisors and their clients regarding philanthropic gift planning and execution and handle resulting gifts of complex assets.
- Maintain strong relationships with professional advisors and their firms, positioning the Community Foundation as their trusted philanthropic partner.
- Attend professional association events and make presentations to promote the Community Foundation's expertise in philanthropy.
- Provide input and guidance regarding a strategic program for the cultivation, retention and education of professional advisors.

**EXTRA WISH**  
FUNDING OPPORTUNITY CATALOG  
FOR OUR DONORS | 2022 EDITION

Community  
Foundation  
for Greater Atlanta





## The Opportunity Continued

### Development and Philanthropic Solutions:

- Support philanthropic officers in soliciting additional gifts from existing donors, especially those involving complex funding assets or planned gifts.
- Educate donors and advisors about various philanthropic vehicles and solutions that align with their philanthropic goals.



### Planned Giving Donors:

- Support philanthropic officers in identifying planned giving opportunities and facilitate the closing of planned gifts.
- Oversee charitable trusts and charitable gift annuities at the Foundation.
- Oversee activities related to matured planned gifts and the receipt of gift assets.



### In-House Philanthropic Resource:

- Serve as a knowledgeable resource, answering questions regarding philanthropy, fund options, due diligence, endowment issues, and more.
- Identify, structure, and vet new gift opportunities, negotiate fund agreements, planned gifts, and fees for services.
- Draft and review various types of gift and fund agreements, ensuring compliance with relevant laws and regulations.
- Stay updated on changes in charitable giving tax law and educate relevant stakeholders.

### Leadership:

- Work collaboratively with other philanthropic directors and officer.
- Work with senior leadership regarding new business opportunities and policy issues.
- Attend Foundation Board meetings as in-house counsel and Secretary of the Board.
- Assist the VP of Philanthropy with strategic planning, goal setting, and reporting for the Philanthropy team.



## The Candidate

### Qualifications and Skills:

- Juris Doctorate (JD) required with a minimum of 10 years of experience in estate planning, taxation, planned giving, and/or financial planning.
- Professional designation(s) such as LL.M., CPA, CFP, CFRE or CAP preferred.
- Understanding of financial and philanthropy operations and administration, including investments, CRM databases, charitable tax planning, prospect research, and the fundamentals of fundraising and development.
- Experience with Community Foundations preferred.
- Technical knowledge of charitable tax law, planned giving, and gifts of complex/illiquid assets; experience with gifts of complex assets.
- Financial acumen for accurate and efficient portfolio analysis, budget management, and decision-making and working with financial professionals.
- Excellent interpersonal, oral, and written communication skills with the ability to clearly and persuasively articulate complex ideas to diverse audiences including high-net-worth donors and their advisors.
- Strong leadership, management, relationship-building, influencing, negotiation, and conflict-resolution skills, including the ability to work effectively across all levels of management and staff.
- A clear commitment to equity of opportunity and genuine respect for diversity, equity, and inclusion.
- Proficiency in Microsoft Office Suite including Excel, Outlook, PowerPoint, and Word. Preferred experience with philanthropy records systems database technology such as Raiser's Edge and financial software such as Foundant. Experience with PG calc software (PGM Anywhere) preferred.



Applications should be submitted at  
<https://driwaterstonehc.com/position/director-philanthropic-and-general-counsel-community-foundation-for-greater-atlanta/>

All first-round interviews for this position will take place via video conference with DRiWaterstone Human Capital.

DRiWaterstone Human Capital is a women-founded and led executive search firm recognized by Forbes magazine as one of the leading executive recruiting firms in the U.S. With a focus on purpose and mission-driven organizations, we provide executive search and strategic consulting services to help regional, national, and international clients grow, thrive, and excel.

**Compensation:**

Pay: \$150,000-\$180,000 per year. The salary listed is one component of the total compensation package for employees.

***Equal-opportunity employer:***

Community Foundation for Greater Atlanta provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation, and professional development.