



The Dayton Foundation – Job Posting Announcement

Director, Professional Advisor Relations

Category: Full-time, exempt

Compensation: \$110,400-\$138,000 annually - *This is the starting range for this position, however, the following may determine an appropriate salary outside of this range: experience, education, certifications, and internal equity*

Preferred Start Date: October 2026

Position Purpose: The Director of Professional Advisor Relations is responsible for developing, growing, and stewarding The Dayton Foundation's network of professional advisors, including attorneys, certified public accountants (CPAs), bankers and financial advisors. This role serves as a key ambassador for the Foundation, cultivating relationships that generate charitable giving opportunities, strengthen community partnerships, and expand support for local nonprofits.

The Director will proactively identify and engage new professional advisors, continue to engage existing advisor partners, and educate advisors on the philanthropic services and charitable giving solutions available through The Dayton Foundation. This position plays a critical role in advancing The Dayton Foundation's mission by connecting professional advisors, and community resources to create lasting philanthropic impact.

Key Responsibility: Professional Advisor Development and Relationship Building

Specific Duties:

- Identify, prospect, and cultivate relationships with attorneys, CPAs, financial advisors, and other professional advisors who are not currently engaged with The Dayton Foundation and introduce to development staff.
- Conduct regular outreach through calling and face to face meetings with the goal of scheduling educational meetings, presentations, and lunch-and-learn events with the development staff to increase awareness of The Dayton Foundation's services and charitable giving opportunities.
- Develop and execute strategies that align with the Foundation's mission and community impact goals to grow the Foundation's professional advisor referral network in conjunction with our marketing and development teams.
- Assist development team when needed with recognition and thank you for advisor partner referrals.
- Maintain and strengthen relationships with existing professional advisors who regularly partner with The Dayton Foundation and the development staff through engaging them in lunch and learns or PPP events in coordination with the development staff.
- Partner with advisors to introduce prospective donors to the development staff for charitable giving opportunities and philanthropic services.

Key Responsibility: Program Management

Specific Duties:

- Explore, Develop, support and maintain Foundation's Chartered Advisor in Philanthropy (CAP®) Cohorts and advisor engagement programs.
- Maintain accurate records of advisor interactions and opportunities within the Foundation's CRM/database.
- Regularly update advisor contact information and track relationship development activities.

- Regularly research and work with Marketing team through data mining to uncover advisors that are not currently managing money for The Dayton Foundation.
- Collaborate with marketing and development teams to develop resources, presentations, and communications tailored to professional advisors.

Key Responsibility: Event Participation and Community Engagement

Specific Duties:

- Assist in promoting and securing attendance for Foundation events, including the Professional Planning Partners (PPP) series, Patios and Partners events, and other advisor-focused gatherings.
- Represent The Dayton Foundation at community, business, and networking events to build visibility, foster new relationships and build referral network.

Position Qualification Requirements:

Education and Work Experience

- Bachelor's degree required
- Minimum of 10-15 years of experience in relationship management, philanthropic services, fundraising, professional advisor relations, financial services, or a related field.
 - Any equivalent combination of education and experience that provides the required knowledge, skills and abilities.

Knowledge and Skills

- Proven ability to build and maintain professional relationships and strategic partnerships.
- Excellent communication, presentation, networking, and interpersonal skills.
- Strong organizational skills with the ability to manage multiple priorities and projects.
- Proficiency with CRM/database management systems and Microsoft Office applications.
- Knowledge of charitable giving strategies, estate planning, financial planning, or philanthropy is preferred.

Benefits offered:

- Health, vision and/or dental coverage
- Health Spending Account, Flexible Spending Account, and Dependent Care Spending Account
- Generous paid time off (vacation and sick leave)
- 403(b) retirement plan and company match
- Training and development opportunities
- Wellness options

This job description in no way states or implies that these are the only duties to be performed by the employee. Employees will be expected to follow any other job-related instructions and to perform any other job-related duties requested by any person with authority to give instructions or assignments.

Send résumé and cover letter via email to Jeffrey Sypeck, Director, Human Resources, at jsypeck@daytonfoundation.org

The Dayton Foundation is an Equal Opportunity Employer