

POSITION PROFILE

Senior Vice President of Philanthropic Consulting



National
Philanthropic
Trust

ISAACSON, MILLER



THE SEARCH

National Philanthropic Trust (NPT) seeks a **strategic, forward-thinking, and collaborative leader** to serve as its first Senior Vice President of Philanthropic Consulting.

This is a unique opportunity to join a high-impact philanthropic organization at a pivotal moment of transformation, and to lead and expand its philanthropy consulting practice. The Senior Vice President will oversee a current team of seven in the growing practice, help to steward NPT's larger programmatic vision, and serve as a trusted advisor to the Chief Philanthropy Officer and the operating committee of the organization.

The Senior Vice President will be an experienced leader who is passionate about shaping strategy, fostering talent, and deepening impact. They will bring a drive for service and outcomes, have an appetite for business development, and possess a keen understanding of the philanthropic ecosystem. The successful candidate will have a proven track record of developing a client base and leading teams in delivering world-class strategies, be energized by the opportunity to build institutional capacity and further elevate a high-performing team and be excited to help chart the next chapter of NPT's work supporting philanthropy globally.

National Philanthropic Trust has retained the search firm Isaacson, Miller to assist with this critical recruitment. Instructions for applying, nominating, and inquiring about the position are located at the end of this document.



OUR STORY

National Philanthropic Trust is the leading partner for donor-advised giving, providing donors, family offices, foundations, and financial service institutions with the **solutions and expertise** needed to transform philanthropic intention into action.

Since its founding in 1996, NPT has raised more than \$80.2 billion in charitable contributions and currently manages more than \$65 billion in charitable assets. As the largest independent sponsor of donor-advised funds (DAFs), NPT ranks among the largest grant-making institutions in the United States. It has made more than 930,000 grants, totaling over \$37.7 billion, to nonprofit organizations worldwide.

National Philanthropic Trust has a proud history of innovation. In 2000, it became the first independent organization to offer a private-label DAF program for financial and wealth management institutions. In 2013, NPT's first international affiliate, NPT UK, was established to serve the needs of philanthropists who choose to base their giving in the U.K. In 2021, the organization launched Giving Point, a full-service online platform for donors to manage their NPT DAFs.

Under the new leadership of CEO Holly Welch Stubbing, a nationally recognized leader in philanthropy with over 25 years of experience and thought leadership on giving and grantmaking, the organization is poised for transformation as it charts a bold course for growth and impact. In August, NPT will relocate from its current office in Jenkintown, Pennsylvania, to an improved office space in Conshohocken, Pennsylvania – another vibrant suburb of Philadelphia that is home to a blend of foundations, nonprofits, and financial service institutions.

With an inclusive, supportive, and collaborative culture, National Philanthropic Trust fosters a welcoming environment for more than 235 full-time employees across 18 states in the U.S. and more than 10 employees in the United Kingdom. Approximately 170 employees are based in the Greater Philadelphia area. Staff members are valued, celebrated, and afforded opportunities to bring their entrepreneurial spirit and talents to inspire and enable philanthropy.



THE ROLE

Senior Vice President, Philanthropic Consulting

As a member of NPT's executive team, the Senior Vice President of Philanthropic Consulting (SVP) will **lead and grow NPT's philanthropy consulting practice within the 19-person Philanthropic Solutions department**. Launched in 2019, the practice has become a strategic center of excellence that partners with individuals, families, family offices, foundations, and advisors to design and execute transformative philanthropic strategies, and is now ripe for further growth.

Both **visionary and pragmatic**, the SVP will design the future of NPT's consulting offerings while ensuring operational excellence today. They will guide a high-performing seven-member team, deepen and evolve NPT's philanthropic advisory services, and ensure best-in-class delivery for clients who are among the world's most ambitious philanthropists. The SVP will be responsible for the practice's business strategy, profit and loss (P&L), and growth, ensuring that NPT remains the preeminent partner in strategic philanthropy for its clients.

Reporting directly to the Chief Philanthropy Officer, Jenna Mulhall-Brereton, the Senior Vice President will oversee NPT's philanthropic consulting practice and staff. They will inherit a team of deeply knowledgeable professionals who have built strong relationships with clients, are team players, and have developed thoughtful strategies aligned with NPT's mission.

This is a permanent, full-time position. The salary is estimated between \$225,000-245,000, not including benefits and a targeted bonus of 33% of the annual salary, commensurate with experience.



KEY OPPORTUNITIES AND CHALLENGES

The success of the Senior Vice President will be determined by how well they address the following leadership opportunities and challenges:

Continue to strategically grow NPT's philanthropy consulting practice and strengthen NPT's visibility as a thought leader

The SVP will develop and implement a comprehensive and visionary strategy for NPT's expanding philanthropy consulting practice, encompassing business development, client engagement, and thought leadership. In collaboration with the Chief Philanthropy Officer and peers across the organization, the SVP will design and launch innovative consulting offerings by identifying emerging trends in philanthropy, wealth management, and impact investing. The SVP will spearhead the creation of frameworks, tools, and research that advance best practices in strategic philanthropy, positioning NPT as the convener of innovative ideas and expertise across the global philanthropic landscape. They will further elevate NPT's reputation through their presence and engagement at sector convenings, as well as by crafting external-facing guidance, such as issue primers and trend reports. These efforts will result in further expansion of NPT's consulting capabilities and client base.

In leading business development for the consulting practice, the SVP will cultivate relationships with family offices, foundations, wealth advisors, and centers of influence through proactive outreach and strategic positioning in the sector. The SVP will build and maintain a robust pipeline of consulting opportunities with leading philanthropists and their advisors. They will also oversee the practice's P&L, ensuring financial sustainability, efficiency, and alignment with NPT's mission.



KEY OPPORTUNITIES AND CHALLENGES

Lead NPT's philanthropy consulting practice, ensuring the highest-caliber client service and deliverables

As the practice lead, the SVP will promote the highest standards of delivery across all consulting engagements, overseeing strategy development, research, and implementation. The SVP will manage a portfolio of sophisticated advisory products and engagements, ensuring they reflect the rigor, insight, and excellence consistent with NPT's strong brand. The SVP will also guide the design of bespoke philanthropic strategies and frameworks that align with clients' values, objectives, and impact goals. In addition to supervising the team, the SVP will serve as a senior advisor to a select group of top-tier clients, offering insight, perspective, and strategic counsel at the highest levels. The SVP will periodically serve as lead or co-lead on marquee and high-touch projects for clients, such as strategic giving plans and new program design.

Attract, develop, and motivate a highly skilled team in a growing practice

The SVP will lead and inspire the existing high-performing and collaborative team, continuing to foster a culture of excellence, accountability, and continuous learning. They will mentor, manage, and guide team members on project design, methodologies, and client deliverables to ensure both quality and innovation. By recruiting, developing, and retaining top consulting talent, the SVP will grow a cohesive team that is recognized and well-known for its expertise and thought leadership.

Work collaboratively across NPT, serving as the primary subject matter expert in philanthropic consulting

The SVP will identify and promote opportunities to advance NPT's mission and strategic plan and will engage with colleagues across NPT on new product and service innovations that enhance NPT's value proposition across various donor segments. They will represent the consulting practice to senior leadership and partner closely with leaders in other departments to integrate consulting insights with NPT's offerings for family offices, high-net-worth and ultra-high-net-worth donors, financial service institutions, and financial advisors.



ABOUT YOU

Qualifications and Characteristics

- **15+ years of senior-level experience** in philanthropy consulting, strategy, or philanthropic advisory services for high-net-worth and ultra-high-net-worth individuals, family offices, or foundations;
- Demonstrated success **leading a consulting practice, professional services team, or business line**, including P&L accountability;
- Proven track record of **business development and relationship cultivation** with high-net-worth and ultra-high-net-worth donors, family offices, foundations, and financial institutions;
- Deep **understanding of philanthropic strategy**, governance, impact measurement, and social investment approaches;
- Experience working in or alongside wealth-management environments, with **fluency in advisor and client dynamics**;
- **Exceptional leadership**, communication, and facilitation skills; adept at guiding both teams and clients toward clarity and impact;
- Track record as a **visionary thinker** with the discipline and execution skills to operationalize ambitious goals;
- Exceptional written and **oral communication skills**; and
- Commitment to **integrity, excellence**, continuous learning, and advancing NPT's mission of increasing philanthropy in society.



APPLICATIONS, INQUIRIES, AND NOMINATIONS

The position will remain open until filled. Those interested in applying should submit their resume and statement of interest through the website:

<https://www.imsearch.com/open-searches/national-philanthropic-trust/senior-vice-president-philanthropic-consulting>

Nominations of individuals, along with inquiries about the position, can be submitted through the same website. All correspondence regarding the search can be addressed to the Isaacson, Miller representatives noted below:

Karen Avery, Partner
Mia Carpinello, Senior Associate
Caroline Corry, Senior Search Coordinator

At NPT, diversity is a concept that acknowledges value in the full spectrum of human experience. It includes differences in race, gender, age, national origin, ethnicity, disability, religion, culture, socioeconomic status, sexual orientation, gender identity, veteran status, and other attributes that identify an individual, organization, or group. We recognize that these are not the only factors that contribute to an individual's identity. Some differences may be obvious, while others may be less apparent. We are committed to an evolving definition of diversity that embraces all forms of individual difference.

This document has been prepared based on the information provided by National Philanthropic Trust. The material presented in this leadership profile should be relied on for informational purposes only. While every effort has been made to ensure the accuracy of this information, the original source documents and information provided by National Philanthropic Trust would supersede any conflicting information in this document.