

## United Church Funds Exempt Position Description

Position: Executive, Business Development      Incumbent:  
Reports to: Senior Executive, Business Development      Department: Business Development

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United Church Funds (UCF) is a not-for-profit corporation recognized as an associated ministry of the United Church of Christ (UCC). The firm manages over \$800 million of long-term assets for local churches, judicatories, ministries and other faith-based organizations. UCF helps clients maximize endowment and related funds through its family of professionally managed investment products. UCF also strengthens the skills of faith-based leaders to manage endowments more effectively through a range of educational programs and supports faith-based organizations in growing long-term assets through planned giving programs.

### Position Summary:

The Business Development Executive will play an instrumental role in the growth and development of UCF. The Business Development Executive will consult with the Senior Executive to develop a strategic plan to identify, qualify and pursue sales opportunities within his/her territory. The territory will include, but not be limited to, the eastern region of the United States. The Executive will focus primarily on UCC churches, health and human service organizations, and other ministries. Sales opportunities, however, will not be limited to UCC institutions and will include other faith-based organizations. The Executive will meet with existing clients as needed to conduct performance reviews and expand UCF's relationship.

### Primary Responsibilities:

1. Identify, qualify and contact UCC prospects to introduce UCF's array of investment management, endowment and planned giving services.
2. Leverage internal resources, regional conferences and client references to identify potential sales opportunities.
3. Manage the sales process – from initial contact, information gathering, sales presentation and follow-up to a decision rendered by the organizations' investment committee.
4. Cultivate professional relationships with clergy and lay leaders; become conversant with the goals, issues and concerns of UCC organizations in the territory.
5. Utilize UCF's funds, SRI platform and services to create a "*solution*" that will distinguish UCF from its competitors.
6. Maintain and update contact information, communication, meeting/presentation notes and status of engagement with prospects and clients in Salesforce.
7. Prepare sales reports in Salesforce that outline prospect pipeline, the status of prospect engagements, next steps, and time horizon.
8. Lead regional workshops and, participate in webinars and other programs to promote UCF products and services, i.e. investments, endowment management and planned giving.
9. Represent UCF at various events including regional and national meetings of church leaders, UCC association and conference meetings, and the bi-annual General Synod.

### Requirements:

1. Track record of successfully increasing customer base while retaining and servicing existing clients.

2. College degree with at least five years (5) sales experience, with knowledge of and experience in investments and financial markets. Professional designations considered a plus.
3. Excellent written, oral communication and presentation skills with a strong aptitude for computer applications including Word, PowerPoint, Excel and Salesforce (or similar CRM system).
4. Previous experience with selling to nonprofit institutions, especially faith-based organizations, is considered a plus.
5. Desire to work in a faith-based environment, for a growing organization, with a commitment to personal and professional development.
6. An enthusiastic, well-organized self-starter with a demonstrated ability to collaborate across departments and work in a collegial environment.
7. Ability to work effectively with diverse audiences, i.e. geographic and investment sophistication, and engender trust and professionalism.
8. Willingness and ability to travel extensively (approximately 60%) to meet with prospects and clients, and attend various UCC events. The executive will also attend the UCF monthly staff meeting in New York City.
9. Knowledge of or willingness to learn about the structure and polity of the United Church of Christ. UCC membership is desirable.

*For more information or for your recommendations, please contact Bridget Langevine, director of Human Resources, at (877) 806-4989 (toll-free), or in writing at 475 Riverside Drive, Room 1020, New York, NY 10115 or [matt.wagner@ucfunds.org](mailto:matt.wagner@ucfunds.org).*