



Position Specification

Chief Executive Officer

Our mission is to inspire giving that impacts life forever. We help people with charitable gift planning, serve as trustee for hundreds of trusts, and function as custodian for many endowments and donor advised funds.

March 2025



CONFIDENTIAL POSITION SPECIFICATION

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| Position | Chief Executive Officer (CEO) |
| Organization | Legacy Deo |
| Location | Austin, TX |
| Reporting Relationship | Board of Directors |
| Website | www.legacydeo.org |

OPPORTUNITY

Legacy Deo, formerly the Lutheran Foundation of Texas (LFOT), was established in 1960 as a planned giving ministry within the Texas District of the Lutheran Church—Missouri Synod. Over time, the foundation's mission has expanded to serve individuals, families, and ministries by facilitating Christian gifting to build God's kingdom. Currently, Legacy Deo manages over \$70 million in charitable trusts, gift annuities, endowment funds, and other management accounts.

The next Chief Executive Officer (CEO) will lead Legacy Deo into the future, providing strategic leadership that advances the organization's Christian mission of *inspiring generosity that impacts lives forever*. The CEO will oversee development, financial management, and administrative functions, while fostering strong relationships with donors, ministry partners, and professional advisors.

This position requires a servant leader who blends business acumen with spiritual leadership to steward the foundation's resources and relationships with wisdom and integrity.



ORGANIZATION BACKGROUND

Legacy Deo was chartered in 1960 as Lutheran Foundation of Texas. Originally a ministry of the Texas District of The Lutheran Church—Missouri Synod, the Foundation was created as a means to receive non-cash gifts. One of the earliest was a tract of West Texas ranchland from a donor who sought to financially support the District’s endeavors.

Years later, we became a separate entity after our outreach expanded and our services grew. While predominately serving LCMS families and ministries, we now also support charitable giving that benefits all types of Christian and humanitarian causes. We offer our services to the entire Christian community, believing that all of God’s people benefit from them regardless of denominational preference. In 2023 we absorbed the assets and accounts of Southern District (LCMS) Lutheran Foundation and began providing services in Louisiana, Mississippi, Alabama, and the Florida panhandle. Because of our long history with the Texas District, we continue to provide a perpetual base of funding for its many ministries as well as to other Lutheran-affiliated organizations.

We are a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code. That means gifts and donations made to our managed accounts, or Legacy Deo itself, are tax deductible to the extent allowed by law.

POSITION SUMMARY

The Chief Executive Officer (CEO) serves as the principal executive leader of the foundation, providing strategic direction and operational oversight to advance the organization's Christian mission of inspiring giving that impacts life forever – by supporting ministries and facilitating charitable giving through endowments, trusts, and donor advised funds. The CEO collaborates closely with the Board of Directors to develop and execute strategic initiatives, while ensuring operational excellence across development, financial management, and administrative functions. This role requires a servant leader who can effectively blend business acumen with spiritual leadership to steward the foundation's resources and relationships with wisdom and integrity.

The CEO must be able to effectively represent the Foundation in various Christian and secular settings while maintaining its distinctive Christian mission and values. Success in this role requires balancing professional excellence with spiritual sensitivity and wisdom.



KEY RESPONSIBILITIES

Organizational Leadership – Providing strategic leadership in collaboration with the Board of Directors

- Partner with the Board of Directors to develop and implement the foundation’s strategic plan and objectives.
- Provide regular updates and comprehensive reports on foundation operations, financial performance, and strategic initiatives.
- Foster strong working relationships with Board members and facilitate effective Board governance.
- Ensure alignment between operational activities and the foundation’s mission, vision, and values.

Donor Development & Donor Relations

- Lead the foundation’s donor development strategy and cultivate relationships with major donors.
- Oversee the development and execution of planned giving programs, charitable trusts, and donor-advised funds.
- Serve as primary executor for donor estates, ensuring the fulfillment of donor intent.
- Foster relationships with professional advisors, estate planning attorneys, and financial planners.
- Ensure excellence in donor services and stewardship reporting.

Ministry & Beneficiary Partnerships

- Develop and maintain strong relationships with supported ministries and Christian organizations.
- Evaluate ministry partner effectiveness and impact of foundation support.
- Identify opportunities for strategic collaboration and partnership.
- Ensure appropriate due diligence in ministry partner selection and monitoring.

Financial & Administrative Oversight

- Oversee financial operations, including investment management, budgeting, and risk management.
- Ensure compliance with all applicable regulations governing charitable foundations and planned giving vehicles.
- Direct the development and implementation of operational policies and procedures.
- Monitor and evaluate organizational effectiveness, implementing improvements as needed.

Human Capital & Organizational Culture

- Build and lead a high-performing senior leadership team.



- Foster a Christ-centered organizational culture aligned with the foundation's values.
- Oversee human resources functions, including recruitment, development, and retention.
- Ensure appropriate staffing levels and organizational structure.

Public Representation & Advocacy

- Serve as the primary ambassador of Legacy Deo to donors, ministry leaders, and the public.
- Represent the foundation at church gatherings, industry events, and other speaking engagements.
- Articulate and support the foundation's long-standing relationship with The Lutheran Church—Missouri Synod.

LEADERSHIP ATTRIBUTES DESIRED

The ideal candidate will demonstrate:

- Strong servant leadership orientation.
- Excellent interpersonal and relationship-building skills.
- Effective public speaking and presentation abilities.
- High emotional intelligence and cultural awareness.
- Strategic thinking and decision-making skills.
- Impeccable integrity and ethical standards.
- Diplomatic and tactful communication style.
- Ability to build consensus among diverse stakeholders.
- Passion for Christian ministry and charitable giving.

PROFESSIONAL EXPERIENCE/QUALIFICATIONS

- Minimum of 5 years of progressive leadership experience in nonprofit or foundation management.
- Demonstrated experience in legacy giving, estate planning, or wealth management.
- Proven track record in donor development and major gift fundraising.
- Experience leading teams of 5+ employees.
- Successful Board relations and governance experience.

EDUCATION

- Bachelor's degree required.
- Master's degree in business administration, ministry, or nonprofit management preferred.
- Certification in planned-giving, estate planning, or financial planning is a plus.



LICENSES/CERTIFICATIONS

- CFRE (Certified Fund Raising Executive) preferred.
- CAP (Chartered Advisor in Philanthropy), CPA (Certified Public Accountant), or CFP (Certified Financial Planner) designation beneficial.
- Valid driver's license required.

OTHER

- Demonstrated commitment to Christian principles and values
- Active member of a Christian church with a clear testimony of Christian faith
- Ability to articulate and support the Foundation's long-established relationship with The Lutheran Church-Missouri Synod
- Ability to engage effectively with Christian donors and ministry leaders

COMPENSATION AND BENEFITS

Legacy Deo will negotiate a generous compensation and benefits package including:

- Salary \$160-175K based on experience
- Employer paid Health Insurance for employee + a portion of HSA/FSA Contribution
- Disability and Survivor Insurance
- Basic Life Insurance
- Retirement 100% agency funded (Defined benefit plan 5-year vesting)
- 403b Savings organization matches 1% on employee's contribution of at least 2% of salary
- Generous paid leave program
- Paid Holidays – 10 days annually

Application

On behalf of Legacy Deo this search is being led by the consulting firm, GSB Fundraising. To apply applicants may send resumes and supporting documentation for consideration to gsbsearchservices@gmail.com.

GSB CONTACT

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