

JOB TITLE: Planned Giving Director

EMPLOYED BY: President & CEO

RESPONSIBLE TO: Chief Development Officer

STATUS: Regular Exempt Employee

PURPOSE OF POSITION: This position is responsible for the growth of charitable assets through estate planning and relationships with professional advisors. This position works directly with donors and their professional advisors and oversees the planning and acceptance of traditional and complex gifts. This position will build and maintain the Foundation's creditability and visibility with professional advisors. The position will be responsible for implementing the planned giving program.

Principal Responsibilities:

- Develop an effective educational and communications program professional advisors
- Serve as the Foundation's principal representative to professional advisors and planners and promote the benefits of using the Foundation to accomplish planned giving objectives
- Work with the professional advisor community through individual meetings, seminars, and mailings in order to identify, cultivate, and solicit new donors and identify and cultivate new intermediaries for the purpose of securing planned gifts to the Foundation
- Guide, train and assist the local affiliate offices in building relationships with professional advisors
- Provide technical support, training and advice regarding deferred giving arrangements to Foundation staff, donors, prospective donors and their professional advisors
- Implement marketing strategies to promote planned giving opportunities to donors, prospective donors, and professional advisors; plan and oversee technical presentations and seminars targeted at professional advisors
- Handle day-to-day administrative responsibilities for the planned giving program and professional advisor outreach program.
- Develop as-needed updates and refine policies and procedures that comprise the operating plan for traditional and complex gifts and the planned giving program
- Coordinate the outreach of the Diamond Society, the Foundation's planned giving society, and the Golden Key Society, the Foundations professional advisor recognition society
- Develop relationships with and implement programs that educate elected officials
- Other duties and special projects as assigned

KNOWLEDGE, SKILLS, AND ABILITIES REQUIRED:

- A strategic, energetic thinker who is well organized and self motivated
- A thorough understanding of gift planning and charitable tax issues
- Highly-developed people skills and ability to interact respectfully with people of diverse backgrounds and perspectives

- Excellent written and oral communication skills
- Commitment to service and the mission and vision of the Foundation
- A bachelor's degree is required and an advanced degree or professional certification is preferred