



Director of Planned Giving

The Director of Planned Giving has the primary responsibility for gifts of estates, trusts, and various other financial assets such as stock, gold, vehicles, etc., that may reflect deferred giving opportunities. The Director of Planned Giving prepares written materials, working with donors on legacy gifts such as trusts, charitable annuities, life insurance, wills, and bequests. Director would normally interface with Western Adventist Foundation for legal documentation required to facilitate the particular legacy gift.

MINIMUM QUALIFICATIONS

Education: A Bachelor's degree is required.

Experience: At least five years of successful professional experience is required, A demonstrated record of success in a related career field such as law, accounting, or financial planning is required.

Skills: Exceptional interpersonal skills with all age groups are required. Strong oral and written communication skills are required. Organizational skills, particularly planning, managing deadlines, and evaluating progress are required. The position is paperwork-intensive and requires skills in proofreading and editing, attention to detail and follow-through. Computer literacy, particularly in word processing, using Internet resources, and using databases is required. An understanding of current laws regarding taxability of donations, familiarity with deferred legacy gift strategies, and knowledge of a diverse array of financial instruments are essential. The ability to develop knowledge of, respect for, and skills to engage with those of other cultures or backgrounds is required.

Effort: Lifting and moving boxes of materials and equipment weighing twenty-five to fifty pounds is occasionally required.

Travel: The scope of the job requires travel to the homes of individuals, in various states, who are seeking help with legacy giving. Position will require driving and/or flying on occasion. Travel to various activities, meetings, events, seminars and workshops, may occur from time to time.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- 1.** Supports the overall long-term financial strength and support of *Canvasback Missions* by visiting with donors and prospective donors regarding deferred and planned gifts.
- 2.** Enhances donor gift planning and giving by remaining current in areas of gift possibilities and the current laws and regulations governing such gifts.
- 3.** Creates positive donor relations by assuming primary responsibility for providing technical support and options regarding planned and deferred gifts.



4. Helps meet fundraising goals by having a thorough understanding of any capital projects, participating in the yearly Phone Campaign, and giving programs.
5. Communicates the status of current fundraising activities to both the general public and senior administrators and stimulates interest in gift giving by preparing written materials including proposals, contact reports, brochures, gift acknowledgments, articles, administrative reports, as well as contributing articles to the On Board magazine.
6. From time to time, in coordination with the VP of Advancement, attend instructional/certification courses such as Certified Specialist in Planned Giving to maintain professional competency in the field.
7. Assures donor confidentiality as well as the confidentiality of the projects undertaken and records handled, by the Office of Development by conducting all personal contacts and communications with donors in a professional manner.
8. Contributes to the overall success of the Office of Development by performing all other duties as assigned.

SUPERVISION

The Director of Planned Giving is supervised by the Vice President for Advancement.