

Director of Planned Giving

Posting Number: 20192014S

Position Type: Staff

Recruitment Type: Internal/External Applicants

Work Schedule: full-time/12-months

Department: 604 - University Advancement

Position Summary

Reporting to the Associate Vice President for Major Gifts, the Director of Planned Giving within the Office of University Advancement (UA) will identify, cultivate and steward planned giving prospects with an increased focus on blended gifts (cash and planned gifts). The Director will be externally focused on leadership and major gift planned giving prospects by designing, implementing and executing a program to acquire deferred giving support for the University's needs with particular emphasis on cultivation and solicitation strategies. The Director of Planned Giving will also partner with and act as a resource and guide to the other fundraising units within University Advancement, including but not limited to regional, athletic, and college-based programs, to secure appropriate planned gifts for their various initiatives and priorities. This position will be responsible for continuing the growth of our strong planned giving program within the context of University Advancement's larger fundraising efforts. This position will manage three planned giving professionals.

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Duties and Responsibilities

- Develop and manage a portfolio of 50-75 gift planning prospects within the alumni, parents, faculty/staff and friend constituencies with a minimum of 100 prospect visits annually. Will be responsible for the identification, cultivation, and solicitation of major and deferred donations.
- Serve as an expert in planned gifts to members of UA's fundraising staff in their gift discussions with potential donors. Understand technical aspects of planned giving vehicles and the relevant tax and estate consequences of these vehicles and how they can be used to enhance Villanova's fundraising efforts. Consistently train UA fundraisers on relevant planned giving topics.
- Direct the Planned Giving program, including supervising three planned giving staff members, setting yearly program and individual goals and objectives, managing within an allocated budget, and meeting regularly with the Associate Vice President for Major Gifts.
- Work with the planned giving staff to implement a marketing program that educates the constituency concerning deferred gifting opportunities so that a continuous stream of planned giving prospects is developed. Work with planned giving staff to manage the administration of all active estates and other testamentary gifts, including communications with attorneys, fiduciaries, and other advisers.
- Work with the planned giving staff to successfully grow the 1842 Heritage Society, which honors alumni, parents and friends who support the University through documented bequests

in their will or other planned gifts. Provides strategic direction for stewardship of Heritage Society members.

- Develop the protocols for planned giving reporting and create written policies and procedures for the planned giving operation within University Advancement.
- Develop strong relationships with our Office of the General Counsel, the Controller, and Vice President of Finance; foster relationships with key members of relevant financial institutions.
- Perform additional duties and assist with special projects as assigned.

Minimum Qualifications

- Bachelor's degree required.
- Must have deep understanding of and practice in industry-standards, best-practices and reporting as defined by the National Association of Charitable Gift Planners (CGP), the Council for Advancement and Support of Education (CASE), and the Voluntary Support of Education (VSE).
- Must be able to prepare proposals and illustrations of life income and estate gift arrangements. Experience with legal research and drafting skills.
- Demonstrated interpersonal skills that facilitates positive collaboration with planned gift prospects and their legal and financial advisors.
- Working knowledge of estate planning techniques, tax law and the general body of statutory, regulatory, and case law regarding planned gifts.
- The individual must have a deep commitment to the well-being of the University, a commitment to the University's Catholic/Augustinian heritage, and the advancement of its mission, and to serving the needs of a diverse community.
- 7-10 years of experience in fundraising or in working with high net worth individuals through a family office or as a charitable advisor. Managerial experience required.
- Excellent verbal and written communication skills.
- Demonstrated skills in management, writing and editing logical, detailed and analytical reports required.
- Superior attention to detail along with significant organizational skills required.
- Ability to define goals and objectives, identify target audiences, and develop and implement strategic plans to accomplish University Advancement goals.
- Must be able to work collaboratively and manage accomplished planned giving team.
- Knowledge of general office equipment including personal computers, PG Calc, word processing software, spreadsheet software and database software required.

Preferred Qualifications

Advanced degree, and/or designation as a Chartered Advisor in Philanthropy® preferred.

Physical Requirements and/or Unusual Work Hours

Ability to travel and work evenings and weekends required.

Special Message to Applicants

Posting Date:

Closing Date (12am ET):

Open Until Filled:

Salary Posting Information: Commensurate with experience.

Salary Band: K

Job Classification: exempt

To apply, visit: <https://apptrkr.com/1416483>

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