

Legacy /Gift Planning Advisor

Identify, cultivate, solicit, and steward planned giving prospects and donors. Develop, promote, maintain, and expand the Legacy and Gift Planning program in coordination with the Legacy and Gift Planning Manager. Share information regarding the various types of available planned giving opportunities. Interact and coordinate, as necessary, with Food For The Poor's legal department regarding estate settlements, questions of procedure, process, etc. Collaborate, when appropriate, with donor's attorney, broker, and bank trust officer. Initiate and participate in related communications and meetings with involved parties to build long-term relationships and achieve planned giving goals

Duties:

- Identify and cultivate planned giving prospects through phone calls, written correspondence, and individual visits.
- Follow-up on leads and referrals.
- Promote all forms of planned giving to donors and prospects through mailings, articles, presentations, and personal contact.
- Track gift patterns of major donors; track wills in probate; maintain contact with estate representatives; and respond to inquiries regarding potential planned or estate gifts.
- Provide weekly, in-person and/or virtual updates to the Vice President of Institutional and Legacy Giving.
- Participate in developing comprehensive goals and objectives for the Legacy and Gift Planning
- Maintain current knowledge on charitable tax laws and estate planning techniques.
- Travel to meet with donors, attorneys, and other involved participants.
- Maintain memberships in professional associations related to planned giving and fundraising.

Knowledge/Skills/Abilities:

- Knowledge and understanding of various planned/charitable giving vehicles, products and techniques. Familiarity with current estate tax and gift tax laws. Some accounting knowledge desirable.
- Excellent communication (oral and written) and interpersonal skills.
- Ability to establish rapport and build relationships with older people, including those inspired to support our mission due to and through their religious faith.
- Skilled in being able to share information about appropriate planned giving vehicles based upon knowledge acquired through building a meaningful relationship with donors and prospects.
- Ability and willingness to travel regularly.
- Computer literacy and knowledge of planned giving programs, Microsoft Word, Access, and Excel.

Education: Bachelor of Science or Bachelor of Arts degree.

Experience: Minimum of five years related experience in a fundraising or direct marketing organization.

***This position will not require relocation**

Salary Range: \$64,911 - \$97,366