

## Planned Giving Gift Officer- 78661

**Children's Hospital of Philadelphia (CHOP)** advances pediatric healthcare by translating medical discoveries into new therapies and cures. To enable progress at the fastest pace, the CHOP Foundation inspires philanthropic giving to support the hospital's needs. In this way, our world-renowned clinicians and scientists can work collaboratively to guide each and every patient family to their own personal best outcome.

The CHOP Foundation offers a dynamic work environment that celebrates collaboration, ongoing learning, and the rich diversity of perspectives and life experiences. We do this to ensure Children's Hospital remains the premier destination for pediatric healthcare within our community and across the world. If you are a development professional who is interested in joining our team, we invite you to explore the opportunities listed below.

### **Job Summary:**

This position will develop long-term philanthropic relationships with donors and prospects, with the ultimate goal of soliciting these individuals for a planned gift including bequest intentions, gifts of non-cash assets and life income gifts to the Hospital. Reporting to the Director of Planned Giving, the Gift Officer oversees the identification, qualification, cultivation, solicitation and stewardship of individuals making deferred and other specially structured gifts and provides education to donors who are considering making planned gifts or involving complex gift structures.

### **Job Responsibilities:**

Identify, cultivate, solicit, and steward a portfolio of 150 prospects with capacity to make a 6-figure gift, meeting annual fundraising goals and expectations.

- With an increased emphasis on blended gifts, collaborate with annual, major and principal gift officers to identify prospects and cultivate to successful solicitations.
- Collaborate with financial advisors, attorneys, and other relevant advisors regarding planned gifts.
- Proactively obtain written documentation and valuation of bequest intentions.
- Encourage, market, and solicit in support of the Lewis Society, CHOP's planned giving society.
- Develop extensive knowledge of hospital programs and research initiatives which can be matched to donor interest.
- Maintain strong knowledge of current tax laws and rules related to charitable gift planning.
- Support planning of special cultivation and stewardship events in collaboration Foundation colleagues.
- Participate in planned giving marketing activities including the identification and memorialization of donor storytelling.

### **Required Education & Experience:**

Bachelor's degree.

At least five (5) years of experience in Development, with two (2) years' experience in planned giving or complex blended/major giving or previous commercial experience in law, wealth management or financial planning.

### **Preferred Experience:**

Five (5) years Development experience in a large, complex organization, such as an academic medical center, hospital, or university. Previous experience with identifying, cultivating, soliciting, and closing 6-figure gifts from individual donors.

### **Additional Technical Requirements:**

- Knowledge of basic estate and financial planning concepts and the fundamentals of fundraising and proposal development.

- Knowledge of how particular charitable options affect the donor's and/or the income recipient's tax situations.
- A sincere appreciation for people and how they are each uniquely motivated.
- Poised and engaging, empathetic communications style based on natural warmth and enthusiasm.
- Fast-paced and results oriented with the ability to work in a timely manner with multiple deadlines and competing requirements.
- Strong written, presentation, verbal, organizational, and interpersonal skills; demonstrated ability to relate well to individuals from diverse backgrounds.
- Demonstration of good judgement, professionalism and the highest standards of ethical conduct.
- Ability to undertake regular travel within a 50 mile radius of Philadelphia.