COMMUNITY FOUNDATION OF NORTHERN NEVADA

POSITION DESCRIPTION

POSITION TITLE: Director of Gift Planning

REPORTS TO: President and CEO

STATUS: Exempt

DESCRIPTION:

The Director of Gift Planning is a lead relationship and Financial/Estate Gift Planning and Implementation position at the Foundation. The position is responsible for the planning, implementation and execution of a strategy to attract major, planned, and legacy donors to utilize the Foundation to fulfill their philanthropic and financial goals.

The Director of Gift Planning works closely with the President and CEO, the Chief Financial Officer, and the Philanthropic Advisors to expand the Foundations relationships with current and prospective donors and professional advisors, educating them about our services and charitable giving options.

The Director of Gift Planning works with the Donors and their professional advisors to structure gifts, including the development and analysis of agreements, transactional documents, and legal documents, to memorialize, document, and record current and future gift arrangements. The Director of Gift Planning is the primary architect and facilitator of transactions, guiding each complex gift arrangement from conception to completion.

Plans, coordinates and ensures implementation of strategies to build relationships with professional advisors and high net worth populations. Develops and maintains a vast network of professional connections to help advisors and their clients utilize the Foundation for significant financial and estate giving. Coordinates with other staff for fund development including but not limited to: volunteer and donor management; research, cultivation and solicitation; and gift processing and recognition.

REQUIREMENTS:

- Highest personal integrity, standards and professional ability.
- Minimum five years' experience in a financial planning and/or planned giving position with proven results.
- Bachelor's Degree from an accredited 4-year College or University
- Ability to simultaneously manage multiple projects and priorities.
- Reliable transportation
- CFP or CFA certification is preferred. A CFRE certification with 5 years minimum experience in planned giving, including substantial experience in facilitating and managing gifts of real estate and establishment of charitable trusts, may substitute for CFP or CFA.
- Keyboard and computer skills to utilize word processing, spread sheets and databases for communications and record keeping.

KNOWLEDGE, ABILITY, AND CHARACTERISTICS:

- Strong interpersonal/human relations skills, verbal and professional written communication skills
- Exceptional presentation skills
- Experience in serving as lead on designing/processing complex gifts
- Experience in establishing and managing legal entities including charitable trusts, LLC's, and serving as Executor/Trustee of estates
- Knowledge of topics related to financial and estate planning
- Ability to interact with diplomacy and tact amid influential clients and diverse groups
- Ability to maintain relationships with significant and influential individuals
- Ability to solicit gifts
- Ability to adapt and respond to various situations

Development Responsibilities

- Works closely with the President & CEO, the Board and the Fund Development Committee to implement development activities focusing on identification, cultivation and solicitation of donors.
- Identifies prospects and engages staff, volunteers, and current and former board members in generating new relationships and contributions.
- Manage planned gift prospects to best meet individuals' charitable giving goals.
- Oversee planned gift administration to ensure timely and accurate receipt of complex gifts.
- Builds the Foundation's base of professional advisors (PA's); strengthen existing relationships; and encourage client referrals through a mix of individual meetings, educational seminars and recognition activities.
- Utilizes the Community Foundation's Prospect Management and Tracking System, electronically through proper and consistent use of FIMS CRM and Salesforce. Maintains and creates relevant CRM prospect and objective reporting using available CRM dashboards, summaries and reports.
- Create and monitor ROI on development costs to ensure an effective return and continued asset growth for the Foundation.

- Attends all Foundation events, ensuring that appropriate prospects as well as current fund holders and legacy society members participate.
- Engages with the Foundation's Fund Development Committee
- Participates with the President & CEO, staff, and Board in charting the Foundation's course in fund development.
- Critiques fundraising materials brochures and materials and provides feedback so materials fit the needs of planned giving and charitable gift planning activities and interactions with prospects/donors.
- Builds working relationships and serves as development liaison to professional advisors and high net worth prospects to achieve major and planned giving goals.
- Nurtures a culture of philanthropy in the community and among fund holders, community organizations, and professional advisors.
- Ensures that the Foundation maintains the highest standards of professional courtesy in interacting with people over the phone, in person, and through written materials.
- Ensures compliance with all relevant regulations and laws, has a high level of knowledge of state and federal taxes, maintains accountability standards to donors and ensures compliance with code of ethical principles and standards of professional conduct for fundraising executives.
- Helps identify, cultivate, and develop Board members, providing training for their ambassador responsibilities and objectives as relate to growing professional advisor and donor/fundholder relationships.
- Actively engages Board members and the President & CEO in key contacts, as appropriate.
- Actively engages Board members in identifying prospective fund holders and legacy society members. Gets the best thinking and involvement of each Board member and stimulates each one to give his/her best.
- Serves as a primary presenter, along with the President & CEO of information about the Foundation to professional advisor and donor prospect target audiences.
- Maintains procedure manuals for the Director of Gift Planning position.
- Willingly performs any and all tasks as assigned by the President & CEO.