POSITION ANNOUNCEMENT

Job title:	Associate Director, Gift Planning		
Department:	Office of Gift Planning		
Hours:	40+ per week		
Opening:	August 21, 2017	***Closing:***	Open Until Filled
Classification:	Exempt, Professional	***Benefits:***	Yes

General Position Summary:
The Associate Director is responsible for working with UA donors, professional advisors, and University Development Program (UDP) staff who wish to provide gifts to the University of Arizona Foundation through bequests, charitable remainder trusts, charitable gift annuities, and other charitable, estate planning vehicles. The Associate Director will also oversee all aspects of the gift planning office's life insurance administration including communicating, organizing, compiling, monitoring, and tracking data.

Supervisory Responsibility:
This position is not supervisory in nature.

Essential Function/Major Responsibilities:

- Identify, cultivate, and solicit prospects making outright and deferred gifts.
- Continue cultivation and stewardship of current gift planning donors.
- Assists donors and their legal counsel with appropriate will or trust language for use in estate planning documents.
- Each year, have 100 personal visits with donors and prospects in areas assigned by AVP.
- Develops and maintains an understanding in tax, trust, and other estate planning laws affecting charitable giving.
- Establishes and maintains successful working relationships with members of the UDP team.
- Administers life insurance policies managed by the Foundation, including:
  - Monitor the cash value and the long-term viability of permanent policies.
  - Organize and mail premium payment notices and policy updates as needed.
  - Maintain data integrity for all life insurance policies.
- Assists Director of Gift Planning as needed in preparation and implementation of a marketing plan for promoting planned gifts.
- Utilizes the common systems, policies and procedures of the University Development Team.
- Works effectively as part of the greater UDP. Maintains current and accurate records of donor prospects in Raiser's Edge. On a daily basis, enters contact reports of all visits, significant telephone conversations, letters and correspondence, gift solicitations and other communications with donors. Maintains information about current and future gift proposals (asks).

Essential Function/Major Responsibilities (Cont.):

- Partners with, and effectively utilizes, the development professionals and resources of the UDP, including the offices of University Development, Regional Development & Engagement, Annual Giving (telephone, direct-mail, and e-solicitation services), Donor Services, Prospect Management and Research, Financial Services, Information Technology, and UDP HR & Talent Management.
- Assists Gift Planning team with creative input and departmental tasks to ensure the office's efforts are well-coordinated and performed in a professional and efficient manner.
- Performs other related duties as required.

Secondary Functions:

- Assist with online database and Gift Planning paper files.
- Maintain active membership in gift planning related groups.
- Maintain professional certification(s) if applicable.

Job Scope:

Perform duties independently. Identify parties interested in charitable giving. Position requires building relationships of trust with donors and members of the UDP. Recommendations to integrate Gift Planning into the comprehensive development team are encouraged.

Interpersonal Contacts:

This position requires face-to-face, telephone, and e-mail contact with: gift planning and development office colleagues, members of the university community, the investment manager, donors, prospects, and professional advisors. Many communications are confidential.

Specific Job Skills:

- Understanding of basic tax, trust, bequest, and legal matters as they relate to charitable giving.
- Knowledge and understanding of investment and financial matters.
- Excellent communication and interpersonal skills, specifically an ability to relate well to and instill trust in donors of all ages, their financial advisors, and members of the academic community.
- Ability to be detail-oriented and organize and set priorities independently in an accurate and timely manner.
- Ability to maintain confidentiality at all times.
- Ability to deal with death and dying in a sensitive and professional manner.
- Ability to work as a team player.
- Ability to operate a personal computer and a working knowledge of software programs such as Microsoft Office and planned giving software (PG Calc).

Minimum Qualifications:

- Bachelor's degree and three (3) years of university development experience with direct responsibility for gift planning; OR
- Bachelor's degree and three (3) years of experience as a practicing attorney, accountant, or trust officer; OR
- Bachelor's degree and three (3) years of experience in financial services, life insurance, or a related position as approved by Human Resources.
- A valid driver's license.

Preferred Qualifications:

- Law degree and or educational emphasis in tax or estate planning.
- Professional certification (CPA, CFP, ChFC, CLU, CTFA, CFA, etc.).
- Experience in law, financial services or trust administration.
- Experience working within a successful gift planning office.
- Familiarity with Raiser's Edge or Blackbaud CRM.

Work Environment:

- Willingness and ability to travel to various offices and departments across campus.
- This position will be required to work evenings and/or weekends as necessary to attend meetings and/or special events.
- Must have regular and reliable transportation and the ability to travel locally and nationally when necessary.

To Apply:

This search is being conducted by High Talent Executive Search, Interested candidates should direct inquiries, resumes, cover letters, and compensation history to:

- **Mindy Suissa Cohen, Vice President, ms@highertalentinc.com**
- **Kimberly Templeton, Executive Search Consultant, kt@highertalentinc.com**

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