



**POSITION TITLE:** Estate and Gift Planning Advisor  
**REPORTS TO:** Director of Estate and Gift Planning  
**PAY SCALE:** \$35 – 40/hr

### **JOB SUMMARY**

Assist with the various components of Amazing Facts' planned giving program. This includes working toward ensuring the success of the department, which exists to support the ministry's evangelistic work by securing deferred gifts made through bequests, gift annuities, charitable remainder trusts, charitable lead trusts, IRA distributions and outright gifts real estate, stock, and other non-cash gifts. Duties include identification, cultivation, solicitation, and stewardship of current donors and prospects who have an interest in supporting the ministry. The ideal candidate will have a clear understanding and deep appreciation of the mission, values, and organization of Amazing Facts and the Seventh-day Adventist Church.

### **EDUCATION/TRAINING/EXPERIENCE**

1. Agreement with Amazing Facts' statement of faith and core values.
2. Communication, analytical, and organizational skills generally acquired through completion of a bachelor's degree program.
3. Three years of increasingly successful experience in fundraising preferred. Preference may be shown to candidates with experience in gift planning and those with knowledge of gift planning vehicles, marketing techniques, and relevant financial and legal concepts.
4. Preference would be for a candidate that is certified in planned giving and trust services who could be on a fast track to step into the Director position within 2 years.

### **QUALIFICATIONS**

1. **Organizational Skills:** Excellent organizational skills with proven ability to plan, coordinate, and implement multiple projects simultaneously under tight deadlines.
2. **Communication Skills:** Exceptional communication skills, including presentation and negotiation skills. Demonstrated ability to write clearly and persuasively.
3. **Professionalism:** Ability to work in a team environment, with professional demeanor, self-reliance, and resourcefulness. Work well in a fast-paced environment; treat others with respect and consideration; accept responsibility for own actions. Ability to keep confidential information secure. Demonstrated tact and diplomacy in difficult or sensitive situations.
4. **Relationship Building:** Ability to carry out effective prospect identification and assessment, engagement and cultivation, and solicitation and stewardship of plans for gift prospects and existing donors.
5. **Computer Skills:** Knowledge of a variety of computer software applications in word processing, spreadsheets, customer relationship management, and presentation software.
6. **Attention to Detail:** Consistent attention to detail in composing, typing, and proofing materials; establishing priorities; and meeting deadlines. Must be able to work in a fast-paced environment with demonstrated ability to juggle multiple competing tasks and demands.
7. **Flexibility:** Willingness to travel about 25 percent of the time throughout the United States and maintain a flexible work schedule. Manage competing demands and unexpected events.
8. **Customer Service Skills:** Pastoral visitation ministry is helpful. Ability to prioritize internal and external interactions and respond appropriately. Strong interpersonal and telephone skills, and able to work well with senior citizens.

## **DUTIES AND RESPONSIBILITIES**

1. Maintain a close, growing relationship with Jesus Christ.
2. Identify, cultivate, solicit, and coordinate stewardship activities for planned giving prospects.
3. Prepare correspondence, reports, and proposals for prospective donors.
4. Develop visitation plans and coordinate all travel arrangements for gift prospects and existing donors pursuant to the overall departmental goals.
5. Match prospects' needs to donation opportunities by examining financial status/goals, interests, and activities in order to determine appropriate cultivation and solicitation strategies.
6. Providing adequate follow-up on donation opportunities with the goal of timely completing gifts.
7. Maintain accurate and thorough records, contact reports, and background data to preserve institutional memory and facilitate programmatic performance evaluation.
8. Maintain strong professional relationships with development team, professional advisors, and other gift planning fundraisers.
9. Continue professional development/denominational certification by attending seminars and conferences, as well as keeping abreast of current tax laws as they pertain to charitable giving.
10. Assist director with planned giving marketing program, property management, trust/estate administration, and all other duties that may be assigned.