



POSITION TITLE: Planned Giving Director

REPORTS TO: VP of Ministry Development

PAY RANGE: \$38 - \$45 / HR

JOB SUMMARY: Oversee and manage all aspects of the planned giving program for Amazing Facts, supervising gifts made through bequests, trusts, charitable gift annuities, and other planned giving vehicles.

EDUCATION REQUIREMENTS: Bachelor's Degree in communications desirable or demonstrated proficiency in oral and written communication, 3-5 years of previous experience in successful planned giving program.

AREAS OF RESPONSIBILITY:

- Maintain a close, growing relationship with Jesus Christ.
- Establish volume and dollar annual goals for each planned gift vehicle.
- Prepare materials, including articles, ad copy, to market the planned giving program and promote the concept of planned giving.
- Maintain updated information on our various ministry programs to report back to partners what their gifts have accomplished and any other relevant stewardship information.
- Identify research, qualify, and cultivate partners on individual planned giving portfolio.
- Meet with planned giving prospects and their advisors, prepare financial illustrations of proposed gifts, and draft gift agreements for review by prospects and their advisors.
- Serve on TAC (Trust Acceptance Committee) as primary liaison for all planned giving agreements.
- Develop visitation plans and coordinate all personal travel arrangements for gift prospects of \$20,000 or more while keeping travel costs to a minimum and staying within annual budget.
- Fill in visits with other planned giving leads while in a geographic area to maximize time on the road.
- Make personal contact by special letters, e-mails, phone calls, note cards, etc.
- Establish procedures for tracking and qualifying prospects and for recording and reporting gifts. Develop recommendations for gift acceptance policies and ensure that existing policies are followed.
- Organize and conduct seminars for prospective donors and professional financial advisors.
- Use computer system to track all activity with partners and evaluate portfolio reports for planning.
- Promote a collegial atmosphere within the development department, working cooperatively with all planned giving and partner relations staff to help them and the departments attain their overall financial goals.
- Other duties as assigned