

# **Friends Fiduciary Corporation**

## **Planned Giving Program Manager**

### **Position Description**

**Reports To:** Executive Director

**Direct Reports:** None

**FLSA Status:** Exempt, Regular

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**POSITION SUMMARY:** The Planned Giving Program Manager oversees all aspects of the planned giving program for Friends Fiduciary Corporation (“FFC”). This includes: developing and cultivating relationships with development directors, donors and other key contacts to extend and grow the planned giving and philanthropic educational programs of FFC. This position will support development and other staff at Quaker institutions to establish, improve and expand their planned giving efforts, and will work directly with individual donors to complete planned gifts.

#### **PRIMARY JOB FUNCTIONS:**

- Promote and grow FFCs planned giving program through development and cultivation of prospects and current constituents for FFC’s charitable services.
- Provide resources and information for development staff and donors, including information on the FFC planned giving program, gift vehicles and gift illustrations.
- Receive and process planned gifts in coordination with other FFC Staff.
- Provide timely, excellent constituent service for all planned giving program constituents.
- Coordinate the Quaker Fundraisers Gathering.
- Provide reports and other information as requested to planned giving program constituents and CGA charitable beneficiaries.
- Ensure state charitable registrations and renewals and state charitable gift annuity registrations and renewals are completed accurately and timely.
- Coordinate and oversee those aspects of program outsourced to outside administrator.
- Develop and execute marketing plan for FFC's planned giving program; assist Executive Director in marketing and public awareness efforts of FFC generally.
- Develop marketing materials for the program and templates for use by constituent organizations.
- Update and maintain the charitable services section of the FFC website.
- Organize, plan and facilitate educational seminars on planned giving and charitable services for constituents and prospects.
- Represent FFC at Yearly Meetings and other national gatherings as required.
- Other projects as assigned.

#### **MINIMUM SKILLS/EDUCATIONAL REQUIREMENTS:**

Qualifications include:

Planned Giving Program Manager

*Last Updated 1/5/2017*

- A Bachelor's degree from an accredited college/university is required and a minimum of five years of experience in development and/or planned giving.
- Excellent communication, interpersonal skills and organizational skills.
- High degree of professionalism, initiative and ability to set priorities.
- Strong computer skills including high level of proficiency in all MS Office applications.
- Commitment to customer service for internal and external constituents.
- Ability to maintain confidentiality and discretion.
- Comfort in a fast paced, deadline oriented office environment.
- Team player with service centered approach to work.
- Ability to work outside the regularly scheduled workday as needed.
- Ability to stay abreast of changing Federal regulations regarding planned gifts.
- Some travel required.

***At Friends Fiduciary we strive to build a work culture where all employees can contribute their very best and work effectively together without regard to race, ethnicity, physical ability, sexual orientation, religion, gender, and job position or education level.***