

## Director of Gift Planning- Beloit College

### Occupational Summary:

The Office of Advancement & Alumni Engagement's mission is to inform external constituents of the College's mission and goals; involve them as volunteers in fulfilling the mission; and inspire them to invest their resources in support of current objectives and future dreams. The Director of Gift Planning identifies, solicits and stewards gift planning prospects as well as major gift prospects. The Director is responsible for planning and implementing the marketing and stewardship activities of the gift planning program at Beloit College.

### Characteristic Duties and Responsibilities:

1. Serves as the project manager for Planned Giving at Beloit College by ensuring that the college is running a strong and efficient planned giving program. This will involve actions by college staff, leadership, trustees, and will involve seeking out the best external partners for the rejuvenated program.
2. Identifies, cultivates, educates, solicits, and stewards gift planning prospects as well as major gift prospects, as appropriate.
3. Maintains a portfolio of 60-80 alumni and has an annual visit goal of 60 in person meetings.
4. Administers the Gift Planning Program, including, record keeping, marketing, and stewardship of planned gifts.
5. Prepares and presents detailed gift planning proposals to prospective donors and/or their advisors. Also prepares proposals for fundraising staff to present to their prospects.
6. Develops and maintains expertise in tax, investment and legal aspects of charitable giving, and articulates this information effectively to donors, their advisors, fundraising staff and volunteers.
7. Works with donors, their advisors and staff in drafting gift agreements and other legal form documents.
8. Serves as a source of estate planning and financial planning expertise and information for all fundraising staff, donors and their advisors.
9. In conjunction with Prospect Research and Management as well as all other gift officers, reviews and assesses gift planning prospects to assure accuracy of rating, inclination and make updates as appropriate.
10. Works closely with gift officers assigned to reunion classes to educate them and their reunion gift committee volunteers on the ways to establish life income gifts and/or bequests.

11. Implements and oversees a comprehensive marketing program including mailings, Beloit Magazine ads, the gift planning website. Develop ideas, content, and coordinate production with the Communications & Marketing Office.
12. Develops and maintains an expertise in asset management and administration for Beloit's life income gifts. Interfaces with Beloit's asset manager and administrator on a regular basis. Effectively articulates asset management and administration information to staff, donors and their advisors, and volunteers.
13. Oversees the recruitment of Duffy Society members and assists in the formulation and execution of the overall stewardship plan for the Duffy Society, including working with Donor Relations & Stewardship on any annual events.
14. Oversees incoming gifts from estates in the process of being probated and administered, working with fiduciaries and their advisors toward the efficient distribution of Beloit's interests.
15. new entry: here
16. Implements other initiatives as the opportunities present themselves

#### Credentials and Experience:

1. Bachelor's degree; advanced degree is preferred.
2. Prior planned giving fundraising experience or a background in legal or financial estate planning is preferred.
3. Must have excellent interpersonal skills and be able to work collaboratively with a variety of colleagues and constituents.
4. Demonstrated strong organizational, writing and communication skills, with attention to detail.

#### Knowledge, Skills, and Abilities:

1. Thorough understanding of fundraising programs, with a focus on planned giving, planned gift vehicles and a thorough understanding of gift management and stewardship
2. Strong public relations and organizational skills
3. Outstanding oral and written communication skills
4. Ability to compose reports, business correspondence, and planned gift proposals

5. Ability and commitment to be an effective team member
6. Knowledge of and ability to use fundraising databases
7. Working knowledge of tax and gift planning laws
8. Working knowledge of planned giving software programs
9. Ability to effectively establish and maintain cooperative working relationships

The intent of this job description is to provide the general nature and level of work required of employees who are assigned to this classification and shall not be constructed as an all-inclusive list of duties and responsibilities. Employees may be instructed to perform job-related duties and responsibilities other than those specifically presented in this description.

Salary Range \$75,000-\$90,000

#### How to Apply

To apply send a cover letter, resume, and names and contact information of three professional references.

[Begin Your Application](#)