



Sample PLANNED GIFT OFFICER JOB DESCRIPTION

External Title: Charitable Gift Planning Advisor
Internal Title: Planned Gift Officer
Reports To: **Title**

Purpose of position: To secure planned gift commitments for the organization by fulfilling the interests and passions of donors by providing them with planned giving opportunities, finding out about the donor's planned gift related interests, and asking them to make a planned gift.

Ongoing responsibilities:

1. Actively solicit gift prospects for current, capital and planned and blended gifts, and manage an assigned caseload of up to 150 planned gift donors.
2. Create and manage individual planned gift strategies for each person on the caseload.
3. Create a plan for each donor that is driven by that donor's passions and interests while addressing their concerns related to estate and financial planning with an appropriately crafted planned gift proposal.
4. Coordinate with the development staff to maximize results, avoid duplication of effort, and ensure comprehensive follow-up.
5. Create monthly reports on caseload progress.
6. Perform other major and planned gift donor activities as required by management.

Performance will be measured by:

1. Creating strategies to cultivate, solicit and close planned gifts.
2. Achieving overall agreed-upon production goal based on individual donor strategies, meeting agreed upon numbers of asks, types of gifts and value of gifts.
3. Securing project and organization information, as well as information relating to the donors planned gift related interests, which result in the creation and writing of appropriately crafted planned gift proposal.
4. Creating timely reports that reflect caseload performance.
5. Management of people, process, deadlines and budget while adhering to the policies and procedures of the organization.



6. How well you get along with peers, subordinates and management and maintain a positive and constructive attitude while solving problems. Being a team player and protect the mission, goals and values of the organization.