TITLE: Director of Planned Giving
REPORTS TO: President and CEO

POSITION SUMMARY AND BACKGROUND:

A significant number of the Community Foundations new donor relationships are referred by their professional advisors. We have built strong relationships in the local professional advisor community (attorneys, accountants, financial/investment advisors, and life insurance agents) over our 50+ year history and seek to increase our capacity to strengthen that network further. The Director of Planned Giving is responsible for deepening and broadening the advisor network throughout the Mid-Hudson Valley, as well as continuing to develop and implement the Community Foundations’ gift planning and Legacy giving program. This individual will also work directly with active and prospective donors to encourage and facilitate current and future gifts, and will serve as a planned giving resource to donors, prospective donors, nonprofits, and professional advisors. Applicants with diverse backgrounds, experiences, abilities and perspectives are encouraged to apply.

Salary range is $65,000 to $73,000 plus benefits.

DUTIES AND RESPONSIBILITIES:

- Develop and implement programs, services, and collateral materials to foster and sustain productive relationships with professional advisors, and position the Foundations as a resource and ally in their client work with charitable giving and philanthropy.
- Identify, cultivate and solicit planned giving and current endowment fund prospects – individuals, and private foundations through personal meetings, referrals, presentations, phone calls, publications, special events, and mailings.
- Provide quality planning services for donors by listening to their needs, creating customized suggested gift plans, seeking internal or external advice from staff and other professionals as needed.
- Take the lead on planning and executing professional advisors continuing education seminars and programs.
- Coordinate and present on various topics related to the Community Foundations, planned giving, and endowment building, for professional advisors and nonprofit boards.
- Represent the Community Foundations at various professional associations and events, including participation in local estate planning councils.
- Actively assist the Community Foundations in growing the Legacy Society.
- Participate in asset development strategic planning and implementation, working as a part of the team when necessary and working independently when required.
- Cultivate and maintain professional relationships with advisors. Cultivate new referral sources.
- Advance the Community Foundations commitment to the field of philanthropy by sharing expertise and leadership as appropriate and by staying informed about (i) current philanthropic trends both locally and nationally; (ii) new charitable gift opportunities and (iii) tax laws.
- Maintain accurate and updated records of constituents and contacts including donors, donor prospects, community professionals, and professional advisors.
- Maintain confidentiality of Foundations affairs in communications, both written and oral, and assure such through appropriate filing and disposal of materials.
- Other duties as assigned.

**KEY SKILLS:**
- Bachelor’s degree is required, advanced degree and/or related certifications preferred.
- 5+ years of successful fundraising and development experience including planned giving. Experience in developing and implementing successful planned and major gifts programs preferred.
- Ability to quickly position oneself as a credible, knowledgeable and responsive resource for professional advisors involved in estate and charitable gift planning work.
- Working knowledge of planned giving vehicles and tax laws related to charitable giving.
- Ability to work as a collaborative and positive team member, willing to assist others when needed.
- Proficiency with office software, development databases, computer technology, and basic office management systems.
- Excellent communication, interpersonal, and analytical skills.
- Excellent time-management and organizational skills; the ability to handle a large and diverse workload; and manage multiple deadlines and tasks efficiently and effectively.
- A commitment to serve the community.
- Ability to be flexible and successful within changing environment and demands.
- Exercise good judgment and decision-making capabilities.
- Evidence of dependability and effective work habits.
- Available to work outside of regular work hours, both on- and off-site, when required.
- Working automobile, valid driver’s license, and auto insurance required.

**OFFICE HOURS AND LOCATIONS:**
Monday-Friday, 9:00 to 5:00, 80 Washington Street, Poughkeepsie. Ability to work remotely as Covid restrictions require.

**TO APPLY:**
- Please send cover letter and resume to: Sally Cross, scross@communityfoundationshv.org.
- Position will remain open until filled. Applications will not be reviewed if either document is missing. No phone calls please.

**ABOUT THE COMMUNITY FOUNDATIONS OF THE HUDSON VALLEY**
Founded in 1969, Community Foundations of the Hudson Valley serves and promotes philanthropy throughout the region. An independent, public grantmaking charity, the Foundations administers more than 500 charitable funds which distribute millions of dollars to local, national and international nonprofits annually. Learn more at communityfoundationshv.org.