

**MORRIS ANIMAL FOUNDATION
POSITION DESCRIPTION**

POSITION TITLE: Planned Giving Associate

REPORTS TO: Customer Service Manager

DEPARTMENT: Gifts & Business Development

OVERALL SUMMARY: The Planned Giving Associate will manage the bequests and planned giving program that generates future legacy revenue for the Foundation; Identify, cultivate, and solicit legacy giving prospects, and maintain current legacy donors.

POSITION ESSENTIAL FUNCTIONS:

- Promote the mission and vision of Morris Animal Foundation.
- Assist the Customer Service Manager with annual and long-term business plans by helping to develop tactical strategic goals for realizing new and sustaining existing legacy contributors.
- Work to acquire new legacy donors, retain existing legacy donors and cultivate gifting opportunities within the legacy donor's lifetime.
- Manage existing legacy gifts (open estates), communicate with estate attorneys and representatives, and manage paper and/or electronic files through estate close.
- Adhere to overall risk management (including succession planning) and organizational policies. Promptly report incidents and accidents according to the Foundation's procedures.
- Handle additional projects as requested by the Customer Service Manager

POSITION ESSENTIAL REQUIREMENTS:

- Three years experience in a Customer Service organization
- Experience and sensitivity in working with diverse constituents.
- A proven ability to handle multiple priorities and deadlines.
- Excellent organizational, interpersonal, and verbal and written communication skills are required.
- Ability to practice flexibility in participating in organizational growth and change.
- Ability to travel occasionally

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- Must be comfortable in a wide range of social and business settings.

POSITION PREFERRED SPECIFICATIONS:

- Experience with software including Raiser's Edge, Outlook, and Microsoft Office.
- Familiarity with legal and tax issues applicable to a wide variety of donation practices available to legacy donors
- Familiarity with legacy donation vehicles including Donor Advised Funds and Charitable Trusts
- Non-profit experience

POSITION SPECIFICATIONS:

Full-time, non-exempt, non-supervisory position. Competitive salary and benefits package.