

## **Job Opportunity: Associate Director of Gift Planning**

For more than a century, the **Greater Milwaukee Foundation** (GMF) has been inspiring philanthropy, serving donors and strengthening communities. Together with its donors and many community partners, the Foundation guides and shares a collective vision that Greater Milwaukee becomes a vibrant, economically thriving region comprised of welcoming and inclusive communities that provide opportunity, prosperity and a high quality of life for all.

**You can make a difference, as we are seeking an Associate Director of Gift Planning!** The Associate Director of Gift Planning is responsible for managing a portfolio of Foundation constituents. The individual will assist the Director of Gift Planning in stewarding existing professional advisers in the Herbert J. Mueller Society, cultivating new relationships with professional advisers (attorneys, accountants and financial advisers), overseeing a portfolio of donors and prospects made up of Legacy Society members, business leaders, entrepreneurs and corporate clients, and maintaining strong relationships with Foundation staff and regional community leaders.

### **Qualifications**

- Bachelor's degree in closely related field such as finance, accounting, marketing or law required; graduate degree such as a J.D. with estate planning experience or certification (CPA, CFP) strongly preferred
- Minimum 5 years of experience in positions that involved: 1) estate or financial planning, 2) charitable fund development, 3) cultivation of professional advisers, donors or institutional advancement, 4) corporate philanthropy, or 5) philanthropic advising required
- Experience in the cultivation and securing of major and planned gifts preferred
- Demonstrated knowledge and skills in planned giving, estate planning, tax laws, professional advising and charitable giving
- Demonstrated ability to develop strong and credible relationships with donors / clients
- Knowledge of laws, regulations and processes related to charitable giving and non-profit operations preferred
- Self-motivated, able to work independently and share the GMF story with individuals, estate planning attorneys, investment professionals and CPAs
- Excellent written, verbal and interpersonal communication skills; ability to present effectively to small and large audiences
- Ability to think strategically and creatively in a collaborative environment

We offer an excellent benefit package, which includes health, dental, vision, flexible spending, life insurance, 403(b) retirement plan, paid time off (PTO), educational assistance and more!

Please include resume, cover letter and salary requirements when [applying](#).

Equal Opportunity Employer