

The **Greater Milwaukee Foundation (GMF)** is how Milwaukee works together. For over a century, we have helped generous people give back to the community. Together with donors and partners throughout the region, the Foundation invests in the potential of people and places, supports community-grown solutions and strives to end the systemic racism that holds our region back. Through the power of transformative philanthropy and social change, we are focused on shaping a future where everyone thrives – *a Milwaukee 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 an assigned portfolio of Foundation constituents, stewarding existing donors while maintaining strong relationships with Foundation staff, community ambassadors and professional advisers. The incumbent will lead the CAAN (Community Ambassador and Adviser Network) cohort and steward CAAN alumni. The incumbent will steward existing professional advisers (attorneys, accountants, financial advisers) in the Herbert J. Mueller Society, cultivate new professional advisers, and oversee a portfolio of donors and prospects. This position manages the estate administration process of deferred gifts and the Foundation’s legacy pipeline in concert with the Director of Gift Planning. This position delivers high-quality services to assigned donors to achieve high donor satisfaction.

Key Responsibilities:

- Serves as a liaison to professional advisers with the ultimate goal of developing referrals and obtaining gifts.
- Manages a portfolio of donors and prospects, developing and executing on strategies to bring them closer to the Foundation’s mission with the goal of stewarding donors and increasing their investment through establishing and growing funds, coinvesting in Foundation priorities and creating legacy commitments.
- Executes strategies to engage donors, prospects, advisers and volunteers of color to be implemented as part of the Foundation’s commitment to Racial Equity and Inclusion.
- Develops relationships with assigned donors, prospects and advisers through cultivation calls, virtual meetings, letters and handwritten notes with an emphasis on successful face-to-face meetings.
- Meets regularly with team members to review activities with donors, prospects and professional advisers in their portfolio to determine strategies and follow up on strategy execution including CAAN members.
- Serves as key liaison and facilitator for CAAN including recruiting new members, providing relevant programming and coordinating periodic evaluations to ensure valuable content.
- Works creatively with current and prospective clients and donors and their advisers to create charitable gifts that meet each donor’s financial, estate planning and charitable goals aligned with the Foundation’s strategic priorities.
- Assures that assigned donors and advisers receive the highest quality of service in a timely fashion resulting in a high donor satisfaction rating.
- Supports Director of Gift Planning with the activities of the Herbert J. Mueller Society, the Foundation’s recognition society for professional advisers.
- Stays apprised of the latest developments in income, gift, and estate taxes as they relate to charitable giving.
- Delivers educational presentations and marketing materials to promote charitable giving and the benefits of the Foundation to the Foundation staff and board, members of the Legacy Society, current donors, prospective donors, non-profit organizations, and professional advisers.
- Represents the Foundation at adviser, Legacy, non-profit and donor and prospect events.
- Engages with estate planning councils and other adviser organizations to cultivate relationships with professional advisers and increase estate planning knowledge.

- Manages the following aspects of the planned giving process, in consultation with the Director of Gift Planning: 1) reviewing all planned giving policies, practices and procedures to ensure legal compliance and internal efficiencies, 2) securing fund documentation and/or written gift confirmations from new, current and deferred gift donors, 3) overseeing the estate administration of deferred gifts as they mature.
- Manage legacy donor pipeline and reporting, manage legacy promise data auditing, and oversee legacy promise data entry and accuracy.
- Maintains templates for gift agreements, beneficiary designations, and other documents related to gift planning in consultation with outside legal counsel, which includes updating gift acceptance policies.
- Obtains fund documentation and/or written gift confirmations from new, current, and deferred gift donors.
- Enters notes into Foundation database in a timely fashion after substantive contact with donors and prospects.
- Collaborates with others in the Gift Planning field to promote and stay abreast of best practices.
- Participates in assigned meetings, events, and training as required.

Qualifications:

- Bachelor's degree in related field required, such as finance, accounting, marketing or law; Graduate degree strongly preferred.
- Five (5) or more years of experience in estate or financial planning, charitable fund development, cultivation of professional advisers, donors or institutional advancement, philanthropic advising or other experience with transferrable skills and expertise required.
- Experience in the cultivation and securing of major and planned gifts or experience working with high-net-worth clients in a sales environment strongly preferred.
- Demonstrated commitment to racial equity and inclusion.
- Must have a valid driver's license, proof of auto insurance and reliable transportation.
- Bilingual skills in Spanish desirable.
- 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 nonprofit operations.

Salary: \$94,900

Benefits: 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!

Application Instructions: Send resume material to: <http://www.milwaukeejobs.com/apply/add/79719295>

The Greater Milwaukee Foundation is an equal opportunity employer and encourages people of diverse backgrounds to apply. We celebrate diversity and are committed to creating an inclusive environment for all employees.