

## Job Opportunity: Director of Gift Planning

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 a Director of Gift Planning!** The Director of Gift Planning is responsible for managing an assigned portfolio of GMF constituents, stewarding existing donors and cultivating prospective donors while maintaining strong relationships with Foundation staff, local community leaders and professional advisers. The incumbent actively participates in the implementation of the Foundation's philanthropic initiatives, focusing on fundraising priorities and involving volunteers and other stakeholders in the realization of Foundation goals. This position oversees all aspects of the planned giving process and professional adviser marketing and engagement, as well as provides educational opportunities to Foundation staff and external constituents regarding deferred gifts and changes in tax laws. In addition, this role oversees the Gift Planning team and the work of the Associate Director of Gift Planning in regard to the estate administration process of deferred gifts. This position also delivers high-quality services to assigned donors to achieve high donor satisfaction.

### Key Responsibilities:

#### Gift Planning

- Serves as GMF's principal liaison with professional advisers and Legacy Society members, with the ultimate goal of developing referrals and obtaining planned gifts from prospective donors.
- 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.
- Develops relationships with assigned donors and prospects through cultivation calls, virtual meetings, letters and handwritten notes, with an emphasis on successful face-to-face meetings.
- Implements an annual plan for the cultivation and education of professional advisers of all racial backgrounds in the greater Milwaukee area, which includes representing GMF at adviser and prospect events, conducting individual and group meetings, offering educational presentations, and publishing digital and print-based marketing materials to increase referrals.
- 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 Community Advisers and Ambassadors Network (CAAN).
- Oversees the activities of the Herbert J. Mueller (HJM) Society, the Foundation's recognition society for professional advisers including annual Professional Adviser Seminar and HJM/CAAN recognition event.
- Oversees and engages in annual HJM/CAAN awards program in partnership with Civic Awards lead to ensure candidates are advanced and selected each year.
- Develops 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.
- Coordinates and provides assistance in the design of strategies for cultivating and soliciting donors in coordination with senior staff, leadership and volunteers.
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- Delivers educational presentations and marketing materials to promote charitable giving and the benefits of the Foundation to staff, the Board, Legacy Society members, current and prospective donors, non-profit organizations and professional advisers.
- Works creatively with current and prospective donors and their advisers to create charitable gifts that meet each donor's financial, estate planning and charitable goals that align with the Foundation's strategic priorities.
- Provides oversight to the planned giving process, in concert with the Associate Director of Gift Planning, which includes reviewing all planned giving policies, practices and procedures to ensure legal compliance and internal efficiencies, securing fund documentation and/or written gift confirmations from new, current and planned gift donors, broadly overseeing the estate administration of deferred gifts as they mature, and reviewing new gift agreements before they are signed to ensure legal compliance and the Foundation's ability to fulfill donor intentions.
- Prepares and submits statistics, reports and budget information to the Vice President of Development & Philanthropic Services as requested including oversight of the planned giving pipeline managed by the Associate Director of Gift Planning.
- Works with the Vice President of Development & Philanthropic Services, Director of Development and Major Gifts and Senior Director of Donors Services as part of a team of fundraisers for the Foundation, including joint strategy sessions and other matters important for an effective development effort.
- Work collaboratively with DPS colleagues on projects such as supporting other philanthropic advisers in gift solicitations, donor recognition, donor stewardship, legacy gift marketing and special events.
- Partners with Marketing and Communications to effectively market and brand materials to enhance the cultivation/education of advisers, Legacy Society members, current donors and prospective planned giving prospects.
- Works with Finance to properly accept and administer complex gifts, including but not limited to life insurance policies, real estate, privately held securities and other assets. This includes advancing proposals to the Gift Acceptance Committee.
- Engages in volunteer management work including preparing for and presenting at the DPS Committee and working with volunteers as requested.

### General Management

- 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.
- Participates in estate planning councils and other adviser organizations to cultivate relationships with professional advisers and increase estate planning knowledge.
- Remains abreast of the most current trends by attending educational events, seeking networking opportunities with peers and adopting best practices as they are identified.
- Promotes GMF through attendance at community events.
- Participates in assigned meetings, events and training as required.

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### Supervision:

- Supervises assigned department personnel. Includes the following responsibilities, but not limited to hiring, training, evaluating and ensuring accuracy, timeliness and the completion of all work by direct reports.
- Educates direct reports on all department and agency policies and procedures.
- Meets with assigned staff at least monthly to identify and resolve problems, manage projects, track goals, and review work processes and produces.
- Represents team and/or department at meetings, events and training as required.
- Serves on the DPS Leadership Team.

### **Non-Essential Duties**

- Assists in the creation of annual goals and objectives for the DPS department, which includes carrying out development activities as identified in the team's annual goals.
- Provides staff, Board members and donors with planned giving consultation as it relates to Foundation activity.
- Seeks legal advice from counsel with approval from CEO/President or Executive Vice President, Chief Operating and Financial Officer.
- Performs other duties (or functions) as assigned.

### **Job Specifications**

To perform this job successfully, an individual must be able to carry out each essential duty in a satisfactory manner. The job specifications listed below are representative of the education and experience as well as the knowledge, skill and/or ability (KSAs) required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

#### Education & Experience

- Bachelor's degree in related field required, such as finance, accounting, marketing or law; a Graduate degree or special certification (e.g. CTFA, CPA, CFP) 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, corporate philanthropy or philanthropic advising required.
- Experience in the cultivation and securing of major and planned gifts or experience working with high net worth clients in a sales environment required.
- Supervisory experience preferred.
- Bilingual skills in Spanish desirable.

#### Knowledge, Skills & Abilities

- Ability to support the mission, vision and values of the Greater Milwaukee Foundation and abide by applicable standards of conduct, policies and procedures.
- Demonstrated knowledge and skills in planned giving, estate planning, tax laws, professional advising and charitable giving.

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- Knowledge of laws, regulations and processes related to charitable giving and nonprofit operations.
- Demonstrated ability to develop strong and credible relationships with donors/clients.
- Demonstrated commitment to diversity, equity and inclusion and experience working with individuals from diverse backgrounds effectively.
- Excellent interpersonal, analytical and organizational skills - capable of working effectively with senior management, leadership volunteers, staff members, consultants and donors/prospects.
- Strong project management competencies including organizational and problem-solving skills, strong skills in time management and attention to detail.
- Energetic, self-motivated, flexible and adaptable with a sense of humor, able to multi-task and work independently and cross-functionally.
- Ability to think strategically and creatively in a collaborative environment and build successful fundraising strategies for growth.
- Ability to communicate effectively, verbally and in writing and articulate a compelling case for support.
- Proficient in Microsoft Office Suite applications (i.e. Outlook, Word, Excel, PowerPoint specifically), web-based applications (i.e. Zoom) and databases.
- Must be honest, dependable and able to meet deadlines.
- Must be organized and able to handle multiple tasks.
- Self-motivated and able to work independently.

*Some positions may be eligible to work a hybrid work schedule (i.e. work part of their regular schedule remotely). However, all positions are asked to work the majority of their time from the GMF office.*

**Compensation:** \$109,125

**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:** Please include resume, cover letter when applying to the link below.  
<http://www.milwaukeejobs.com/apply/add/77936119>

*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.*