

FOUNDATION FOR THE CAROLINAS

JOB DESCRIPTION

Title: Vice President of Planned Giving Division/Department: Philanthropic Advancement

Reporting To: Vice President, Philanthropic Advancement

FLSA Classification: Exempt Non-Exempt

Employment Type: Full Time Part Time Intern Contract

POSITION SUMMARY

The Vice President of Planned Giving serves as a lead member of the Philanthropic Advancement team at FFTC, working to cultivate and manage individual relationships within the Center for Personal with an emphasis on growing both unrestricted and restricted planned giving to FFTC. With a current pipeline of over \$1B in documented planned gifts, the Vice President, Planned Giving will oversee the stewardship of existing planned giving donors while simultaneously expanding the planned giving pipeline. The Vice President, Planned Giving will make personal planned giving asks of high net worth donors, draft and execute charitable plans and provide subject matter expertise on FFTC's grantmaking and legacy giving. This position needs knowledge of and comfort with technical aspects of major and planned gift fundraising, including types of gifts, assets accepted, vehicles, and gift planning strategies, and a strong relationship management orientation.

DUTIES & RESPONSIBILITIES

Business Development

- Develop the planned giving business strategy and philosophy through the creation of a 3-year business plan to grow planned gifts to over \$1.5B. The strategy may include potential campaign for planned giving / branded legacy giving program, leveraging key leadership including CEO and leadership team.
- Track, cultivate and solicit new planned giving prospects, including existing fund holders, to identify opportunities to expand philanthropic relationships
- Develop and maintain relationships with professional advisors as key referral sources and partners for planned giving and other opportunities and serve as a point of contact for advisors seeking information on behalf of clients
- Direct professional advisor marketing and programming strategies to drive increased unrestricted asset growth and broader legacy giving opportunities
- Collaborate with the Vice President, Regional Business Development, to identify and cultivate planned giving donors outside Charlotte-Mecklenburg.
- Speak frequently to key referral source partner groups and professional advisors to drive referral business to FFTC
- Serve, along with key staff members, as key public face for FFTC in business development presentations

Relationship Management

- Direct strategic and day-to-day responsibilities of stewardship of the current planned giving portfolio (including existing fund holders), coordinating with dedicated relationship managers (particularly for existing fund holders) as appropriate and maintaining individual assigned fund relationships
- Maintain a portfolio planned gift relationships within the Center for Personal Philanthropy

- Meet with donors to create, review and update current charitable plans, providing drafting and editing support to properly reflect donor wishes & legacy goals
- In conjunction with the Legal team and Donor Relations team, support implementation of realized planned gifts, including trust administration, new fund creation, executor communication, and troubleshooting
- Work with General Counsel, Senior Vice President, Philanthropic Advancement and other key team members on implementation and management of key policies and procedures related to planned giving and gift realization including but not limited to planned gift fees, records management, and reporting.
- In coordination with Finance & Donor Relations team, ensure appropriate documentation of donor wishes are maintained and best practices in record keeping implemented

Marketing & Strategy

- Support FFTC's marketing efforts by joining internal marketing team to identify and execute strategic priorities related to key business lines and working with external vendors on marketing research or other opportunities
- In conjunction with the Marketing & Communications team, plan, create and implement marketing efforts to promote FFTC's planned giving program, including website content, marketing collateral, direct mail, advertising and donor profiles.
- Develop communication vehicles to educate prospects, clients and professional advisors about FFTC planned options, as well as to promote the establishment of planned gifts with FFTC
- Serve on cross-functional teams working on strategic projects impacting the Centers for Giving, including investments, pricing, product development, database management, and stewardship practices, as appropriate
- Plan, track and report on activities with prospects using database system and provide strategic input and direction on database best practices
- Manage processes and procedures to integrate planned giving into the asset development efforts of the team, including but not limited to data tracking, dashboards, information sharing, and cross-selling

Product Knowledge

- Develop a command of FFTC products and services, including planned giving and planned gift vehicles, to speak knowledgeably to prospective fund holders about working with FFTC, including fund types, investment options, acceptance of complex assets, etc.
- Represent FFTC in the community and in targeted efforts including networking, speaking engagements, conferences and nonprofit presentations to speak about planned giving and the resources FFTC can provide in this space
- Keep abreast of current tax laws and planned giving trends

This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required for the position. Other duties, responsibilities and activities may change or be assigned at any time with or without notice.

JOB QUALIFICATIONS

- Bachelor's degree required (focus on business, marketing, finance or related field)
- At least 7-10 years of experience, preferably in fundraising, development, estate planning, or financial services/wealth management
- Excellent oral and written communications skills and interpersonal skills
- Detailed and in-depth knowledge of planned giving and its complexities: estate planning, tax laws, wills, trusts, etc.

- Extensive communications, development or marketing experience in a corporate or nonprofit setting preferred
- Excellent computer skills including working knowledge of Microsoft Office applications
- Previous experience with Blackbaud database preferred
- Initiator who is detail-oriented and a self-starter, customer service and sales orientation
- Ability to set priorities, handle multiple tasks and meet deadlines with a high degree of accuracy and urgency, while receiving deliverables from multiple team members
- Ability to be flexible in a work environment often filled with challenging situations and resource constraints
- General ability to perform the essential functions and overall physical and mental requirements of this position, including stamina to perform tasks over extended periods and ability to occasionally move about to accomplish tasks or move from one worksite and/or workstation to another

Note: Proof of fully authorized vaccinated COVID-19 status and booster are required (or FFTC authorized religious or disability accommodation).

POSITION SPECIFIC COMPETENCIES

Select from the following position-specific competencies. Please limit the total number of competencies to 10 or less.

All Employees: Communication & Interpersonal Skills

Executive Team: Leadership Strategic Thinking Fiscal Stewardship

All Supervisors: Delegating Responsibility & Empowering Employees Managing Employee Performance Ensures Consistent Policies & Practices

General:

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| <input type="checkbox"/> Affiliate Management | <input type="checkbox"/> Budgeting & Cost Awareness | <input type="checkbox"/> Building Organizational Commitment |
| <input type="checkbox"/> Building Team Environment | <input checked="" type="checkbox"/> Client Records | <input type="checkbox"/> Concern for Employee Satisfaction |
| <input type="checkbox"/> Customer Skills | <input type="checkbox"/> Dependability | <input type="checkbox"/> Ensures Proper Training in New Technologies |
| <input type="checkbox"/> Entrepreneurial Orientation | <input type="checkbox"/> Equipment Skills | <input type="checkbox"/> Fund Management |
| <input type="checkbox"/> Implementing New Technologies | <input type="checkbox"/> Initiative | <input type="checkbox"/> Innovative Thinking |
| <input type="checkbox"/> Job Skills | <input type="checkbox"/> Managing Meetings | <input checked="" type="checkbox"/> Managing Multiple Priorities |
| <input type="checkbox"/> Meeting Targets | <input checked="" type="checkbox"/> Presentation Skills | <input checked="" type="checkbox"/> Product Knowledge |
| <input type="checkbox"/> Productivity | <input type="checkbox"/> Project Management | <input type="checkbox"/> Quality of Work |
| <input checked="" type="checkbox"/> Relationship Building/Networking | <input type="checkbox"/> Results Oriented | <input checked="" type="checkbox"/> Technical Skills |
| <input type="checkbox"/> Time Management | <input type="checkbox"/> Training & Development | <input checked="" type="checkbox"/> Writing Skills |