

DePelchin Children's Center Legacy Gift Officer

Reports to: Director, Donor Relations
Supervises: None
Classification: Full-time, Exempt
Location: Memorial Dr., Houston, TX
Benefits: Yes

Position Description:

The Legacy Gift Officer will grow, manage, and enhance DePelchin's legacy giving program as well as manage a portfolio of donors, educating donors about a range of legacy gift options, securing legacy gift commitments and stewarding legacy gift society members. The Legacy Gift Officer is responsible for meeting annual gift commitment targets and working directly with the Director, Donor Relations and Senior Vice President, Advancement to develop and execute a comprehensive legacy gift program.

Responsibilities:

1. Identify and qualify current supporters who have the ability to execute legacy gift through wills and trusts and other charitable giving vehicles.
2. Manage a caseload of qualified legacy gift prospects and current legacy donors.
3. Create and execute individualized marketing, communication and solicitation plans for each legacy prospect/donor in his or her caseload.
4. Execute legacy caseload plans so that prospects and donors are appropriately cultivated, solicited, and stewarded, and 5-year growth projections are met or exceeded annually.
5. Prepare gift proposals for prospective donors and their advisers, both in response to specific inquiries and as a proactive strategy.
6. Work closely with the Donor Relations staff to honor each donor by aligning their interest and passions with our mission, crafting blended gift opportunities and stewardship touchpoints for donors that intersect caseloads.
7. Develop and implement the overall marketing strategy for the legacy program, including content creation, designing marketing materials and producing special events. Work closely with the Donor and Community Engagement staff in incorporating our legacy program into our overall marketing strategy.
8. Actively record and upload interactions into CRM for all assigned donors.
9. Prepare monthly reports that reflect caseload activity and performance; present updates to senior staff and board as requested.
10. Keep abreast of changes in federal and state tax laws that impact legacy giving options.
11. Maintain a strong working knowledge of legacy giving vehicles and familiarity with related laws and regulations governing them, including tax laws.
12. Perform all other duties as assigned.

Required Qualifications:

- Bachelor's degree required.
- Minimum of three (3) years' experience in fundraising.
- Knowledge of general office equipment and software, including use of personal computers, smart phones, printers, and Microsoft Office Suite software (Excel, PowerPoint, and Word).

Preferred Qualifications:

- Experience with constituent relationship management (CRM) database (Raiser's Edge a plus).

APPLY ONLINE AT THE FOLLOWING URL

<https://depelchinchildrenscenter.applytojob.com/apply/iEGVyftJxf/Legacy-Gift-Officer>

OR

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