Legacy Giving Director

Department: Executive Office Fulltime

Location: Houston, TX

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SUMMARY

The Legacy Giving Director will establish and maintain a planned giving program. This position will focus on cultivating relationships with existing stakeholders, as well as financial advisors, attorneys, and estate planners to facilitate planned gifts. Additionally, the Legacy Giving Director will work with key members of executive management to establish a legacy giving society, working to ensure donors feel connected to the organization's mission while exploring and exercising their commitment to future giving.

ESSENTIAL DUTIES AND RESPONSIBLITIES include but are not limited to the following:

Planned Giving Program Development and Management:

- Develop and implement strategies to establish a planned giving program
- Collaborate with other members of staff, volunteers, and executive management to integrate planned giving into overall fundraising strategies.
- Maintain expertise in planned giving vehicles, estate planning, and tax benefits to advise donors effectively.
- Serve as the primary point of contact for all communication regarding planned giving, both internal and external
- Coordinate other potential fundraising projects such as a capital campaign if deemed appropriate.

Donor Cultivation and Stewardship:

- Cultivate relationships with prospective planned giving donors through personalized outreach, meetings, and presentations.
- Steward new members of a planned giving legacy society, ensuring ongoing engagement, appreciation, and communication.
- Develop and execute strategies to recognize and thank members, including special events, communications, and personalized interactions.
- Support other fundraising initiatives in partnership with key stakeholders to develop a comprehensive plan for facilitating planned giving opportunities across the organization.

- Receive and review estate notices and fully coordinate the transfer of estate gifts while maintaining proper compliance and reporting.

Collaboration and Partnership Building:

- Establish and maintain relationships with professional advisors, including attorneys, accountants, and financial planners, to encourage referrals and planned gifts.
- Partner with other departments and divisions to ensure alignment with organizational goals.
- Represent the organization at community events, networking opportunities, and professional gatherings.
- Collaborate with legal and consultants to facilitate non-cash/gifts of complex assets such as real estate, business interests, retirement assets, life insurance policies, personal property, securities, mutual funds, cryptocurrency, private equity and hedge fund interests.

Administrative and Reporting:

- Maintain accurate donor records, including tracking interactions, gift intentions, and stewardship activities.
- Prepare reports and presentations on planned giving program performance and progress toward goals.
- Communicate high level planned giving program performance to key stakeholders.
- Ensure compliance with legal, regulatory, and ethical standards in fundraising and gift planning.

QUALIFICATIONS AND EXPERIENCE

- BS/BA or equivalent
- 5-7 years of experience in nonprofit development
- Ability to build relationships with people of diverse backgrounds, perspectives, and cultures
- Experience in major gifts, donor-advised funds, planned gifts, and/or complex assets
- 5 years of experience in planned giving and/or trust/estate administration
- Knowledge and understanding of charitable sector tax incentives and gift vehicles
- CSPG, CAP, or CFP designation preferred but not required.

OTHER SKILLS AND ABILITIES

Strong customer service orientation and excellent interpersonal and relational skills. High level of confidentiality and professionalism. Strong attention to detail and analytical/problem solving skills. Excellent written and oral communication skills required. Must demonstrate proven organization and project management skills, including ability to manage multiple concurrent objectives, projects and activities while maintaining proper focus on major strategic initiatives. Ability to cope in a changing environment. Ability to interact with Finance and Non-Finance employees at all levels. Positive, enthusiastic “can do” attitude and work ethic.

REASONING ABILITY

Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to analyze facts, arrive at alternative solutions, and provide acceptable recommendations.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The employee may be required to sit, stand, climb, balance, stoop, kneel, crouch or crawl. During the Show, the employee may be required to frequently walk to various places on the grounds. The employee may be required to lift and/or move 15 or more pounds. Requires good manual dexterity (hand, hand with arm, two hands) and multi-limb coordination. Extended work hours required, especially during peak periods. The employee may be on feet for up to twelve hours per day during set-up and the Show.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee may be exposed to dust, chemicals and animals at various times.

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