



We're Hiring!

Position: **Planned Giving Associate**

Location: Remote

Salary: \$50-60,000

Compassion & Choices is seeking a **Planned Giving Associate** to help advance our work to improve care, expand options and empower everyone to chart their end-of-life journey.

This position is responsible for the oversight and management of the activities and vendors that support the work of the planned giving program.

This is a full-time, remotely-located, paid position reporting to the Director of Legacy & Planned Giving. Compensation offered will be commensurate with experience.

We offer excellent benefits including employer-shared medical and dental insurance premiums, employer-paid short- and long-term disability, life and accidental death & dismemberment insurance, flexible spending account for medical and child care, commuter pre-tax benefit, eligibility to participate in 401K with generous 5% employer match and 100% vested at time of eligibility, 11 paid holidays, 17 PTO days first year, and personal days.

Primarily, the person in this position will be responsible for:

Project and Program Management

- Manage the mailing, follow up and statistical reporting of all planned giving communications sent to planned giving donors and prospects, including not not limited to analytics and analysis from vendors.
- Serve as the point person for vendor relationships and management such as Pentera, Stelter, and FreeWill.
- Evaluate communication analytics for strategic follow-up.
- Evaluate, analyze, and prepare planned giving prospect/stewardship/enhanced giving opportunity/geographical lists for follow up and further cultivation/solicitation.
- Maintain collaborative planned giving and major donor process for creation of double ask prospect list.

Program Support

- Provide follow up and communication with estate representatives, family members, and other professionals.
- Manage, update, and research the portfolio of donors and Legacy Circle members for the Director of Legacy and Planned Giving.
- Run reports and update databases on all planned gifts commitments.
- Manage and update portfolio of Legacy Circle members and potential Legacy Circle members, including contact notes and status.

- Write and support follow up of all communication.
- Provide research on key prospects.
- Communicate with estate representatives, including preparation of requested documents for signatures, tracking and updating planned giving plans related to estates in process, and closing estates at fiscal year end.
- Prepare new CGA packages for signature by donors and maintain list of CGAs, work with CGA administration consultant on setting up new annuities, review payments, and other activities related to the program.
- Prepare CGA Illustrations through Crescendo Software.
- Organize a planned giving portfolio for appropriate moves management action plan.

Preferred Qualifications (You will be a good fit):

Education and Experience:

- B.A. in Business, Marketing, Communications or Non-Profit Management– or an equivalency of related experience and/or education may be considered.
- Three (3) years’ experience in nonprofit development, research, or similar field.

Skills:

- Excellent oral and written communication
- Ability to work independently and as part of a team
- High level attention to detail; ability to meet all deadlines.
- Ability to read and write research profile, reports and correspondence. Ability to speak effectively before groups of customers or employees of the organization. Ability to write complex donor background reports that include various source information in a style that is easy to read and understand.
- Mathematical Skills: Ability to add, subtract, multiply and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio and percent and to draw and interpret bar graphs.
- Reasoning Ability: Ability to apply common sense understanding to carry out instructions furnished in written, oral or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.
- Computer Skills: Understanding of donor database/CRM systems including complex query and report building, coding, gift structures (hard and soft credits, source codes, and general ledgers), logic and workflows, and other basic functionality is necessary. Specific experience of EveryAction would be helpful but is not required.

How to Apply:

Email current resume and cover letter as one PDF document to jobs@CompassionAndChoices.org. In the subject line of your email, indicate “Last_First Name, PGA 07-2021”. In your cover letter, please (1) indicate how your personal philosophy aligns with our mission, (2) provide a brief summary of your directly related experience, and (3) provide your salary expectation (with a specific amount/range vs ‘negotiable’).

Questions about the position may be directed to jobs@compassionandchoices.org.

About Compassion & Choices

Across the nation, Compassion & Choices works to create a society that affirms life and accepts the inevitability of death, embraces expanded options for compassionate dying, and empowers everyone to choose end-of-life care that reflects their values, priorities and beliefs. To make this vision a reality, we improve care, expand options and empower everyone to chart their end-of-life journey.

Compassion & Choices is committed to building a staff that reflects the diverse communities that make up our country. We are an Equal Opportunity Employer and recruit, hire, train, promote, and administer any and all personnel actions without regard to age, color, creed, disability, economic status, ethnic identity, gender identity, national origin race, religion, sex, sexual orientation, veterans status, or any other basis prohibited by applicable law.

Link to Job Description: <https://compassionandchoices.org/about-us/employment>