



Planned Giving Officer

Location: New York, NY (*Temporarily Hybrid*)

We believe in a world in which every human life is valued, and health and human dignity are shared by all.

We believe that access to quality healthcare is a basic human right. For more than 100 years, we have worked with global partners to deliver locally sustainable, quality healthcare solutions to women, children, and their communities. We're ready to make it 100 more!

We work tirelessly for women's and children's health because they are disproportionately affected by illness and poverty. We know that healthy, educated, and empowered women are better able to raise healthy, educated, and confident children, and that communities depend on their livelihoods.

We believe in people.

We strive to live out our core values of [collaboration](#), [love](#), [excellence](#) and [respect](#) every day. We provide our employees with a competitive salary and benefits package, with meaningful work and opportunities to learn and grow. We especially encourage all persons of diverse backgrounds to apply.

Overview

Reporting to the Vice President, Development and working together with the Major Gifts and Direct Marketing team, the Planned Giving Officer is responsible for managing cultivation, solicitation, acknowledgement, recognition, donor research, and stewardship of a portfolio of current and prospective planned gift donors. This includes all activities that relate to the retention, growth and tracking of CMMB's planned giving donor portfolio.

The Planned Gift Officer will have comprehensive knowledge of the technical aspects of various planned gifts and the related tax regulations. Experienced in raising major gifts through bequests, charitable gift annuities, charitable remainder trusts and other complex gift arrangements, the Planned Giving Officer works with donors and their financial and legal advisors to secure both outright and deferred gifts in conjunction with donors' needs and CMMB's priorities.

Responsibilities

- Develop strategies for identifying, cultivating, soliciting, and stewarding individuals who would benefit from gift planning as part of their personal and charitable goals.
- Develop a multi-year plan to generate leads and increase revenue through marketing of CMMB's portfolio of Planned Gift opportunities. Collaborate with Major Gifts and Direct Marketing team to integrate Planned Giving messaging as part of a broader communications strategy.
- Create individualized solicitation strategies and identify planned gift opportunities that match donors' interests.
- Ensure all donors are tracked accurately and acknowledged appropriately. Provide support in gift entry, donor record updates, and generating donor acknowledgments for planned gifts as required. Assure accurate, comprehensive data capture, reporting, and analysis for all planned giving efforts against key performance indicators.
- Manage planned giving inquiries, including by phone, email, website, and email marketing software and databases.
- Identify and steward planned giving prospects; increasing CMMB's portfolio of committed Planned Gift donors for stewardship.
- Create charitable gift annuity proposals and draft gift illustration contracts in PG Calc and manage the gift fulfillment process to completion.



- Manage the closure of planned gifts from estates, retirement vehicles, and other sources through probate until gifts are received in database. Conduct reviews of completed documents to ensure that they comply with the CMMB's standards, IRS guidelines, and are in CMMB's best interests.
- Supervise vendor selection, management, and coordination of logistics for Planned Giving and Charitable Giving Annuities (CGA) mailings, and other communications, either in-house or with mail house printers.
- Keep current with and knowledgeable of new trends in planned giving; be aware of new or pending tax legislation.
- Cultivate relationships with attorneys, trust officers, accountants, financial planners, and other estate planning professionals. Exchange up to date information on current best practices.
- Create monthly, quarterly, and annual reports for Planned Giving goals, objectives, and progress
- Manage the annual Planned Giving revenue and expense budgets.
- Oversee all required state filings for the Planned Gift and CGA program, as well as any relevant audits. Ensure that all planned giving activities comply with local, state, and federal regulations and laws governing non-profit business operations.
- Collaborate with colleagues on cross-cutting activities and projects. Contribute to a strong culture of philanthropic values and donor-centric service; and oversee/manage special projects as assigned.
- **Note:** These essential functions are not to be construed as a complete statement of all duties performed. Employees will be required to perform other job-related duties as required.

Qualifications and Requirements

- Bachelor's degree in Business, Nonprofit Management, Public Relations, or related fields required. Legal experience is a plus.
- A minimum of 7 years professional, well rounded experience required in planned giving and donor stewardship, preferably in a nonprofit setting.
- Proficient in researching the giving potential of individuals to secure planned gifts.
- Demonstrated experience in securing a variety of planned gift vehicles, including annuities, trusts, and bequests.
- Advanced proficiency working with database programs and online research tools, such as Blackbaud's Raiser's Edge NXT, ResearchPoint & Luminate Online; managing information flows in a multi-user environment is required.
- Experience working with PG Calc.
- Demonstrable knowledge of fundraising analytics, metrics, and reporting methodologies.
- Able to promote a high level of donor confidentiality, discretion and an ethical approach to fundraising is a must.
- Collaborative team player who excels in a highly dynamic environment and can work cross functionally.
- Excellent communication and interpersonal skills, including ability to build and maintain positive working relationships with team members, constituents, high-level staff, and external vendors.
- Excellent organizational skills, impeccable attention to detail, and the ability to prioritize multiple responsibilities and meet deadlines.
- Personal commitment to CMMB's mission and goals; knowledge of international affairs and global public health a plus.
- Comfortable working for a faith-based organization.
- Valid work authorization to work in the United States
- Must be vaccinated against COVID-19

How to apply

Visit our [careers page](#) for more information and [click here](#) to apply.