

**Updated:** October 15, 2016  
**Position Title:** Legacy Gifts Officer  
**Staff Group:** Stewardship and Development  
**Reports To:** Legacy Challenge Director  
**Location:** Boston, Massachusetts preferred; willing to consider alternate location in the Northeast  
**Grade:** 11, full-time

### Purpose

Working as part of a 3-person planned giving team, to identify, cultivate and solicit prospects to make bequest intentions and/or establish planned gifts. To oversee a broad marketing program, respond to donor inquiries, run illustrations, as well as partner with other gift officers regarding planned giving conversations with donors. To manage ongoing stewardship of Legacy Society donors, ensuring effective and efficient gift administration, while maintaining a small portfolio of prospects. To help nurture planned giving programs in Unitarian Universalist (UU) congregations by leading workshops, either in person or via online webinars.

### Principal Responsibilities

1. Donor cultivation and solicitation for planned giving: Prepares detailed proposals for planned gifts for specific donors at the request of gift officers. Assists Legacy Challenge Director and gift officers in presentation of proposals. Coordinates resources for consultation during solicitation of complex gifts such as charitable remainder trusts, IRA distributions, partnership shares, real property, and hard-to-value assets.
2. Management: Plans, coordinates, and implements Legacy Gifts strategy and operations, including financial recordkeeping and reporting.
3. Donor relations: Works with Legacy Challenge Director as the "first line of contact" to explain and administer existing planned gifts to donors, their families, and their financial advisors. Works collaboratively with gift officers when receiving proposal requests or gifts from repeat donors.
4. Stewardship: Maintains relationships with members of the UUA Legacy Society through mailings, phone calls, visits, and condolence cards.
5. Legacy Gift marketing programs: Coordinates donor-relations marketing and communication design and implementation for outreach to existing and potential Legacy donors. Provides materials, advice, and guidance to congregations and other UU entities that want to secure planned gifts for their benefit.
6. Subject matter expertise: Keeps current with understanding of currently popular and tax-advantageous gifts, such as charitable gift annuities, pooled income funds, charitable remainder trusts, IRA direct rollovers, etc., as well as state and federal regulations pertaining to planned gift vehicles. Works with the UUA Treasurer and the Director of Stewardship and Development to ensure that the UUA's policies regarding regulatory compliance are met.
7. Demonstrates perseverance while adhering to the highest ethical standards, showing sensitivity to donors' needs, and reflects an optimistic and positive attitude in all interactions and communications.
8. Performs gift officer duties and conducts workshops; travels as required.

9. Performs other duties as requested by supervisor, the Stewardship and Development Deputy Director, the Director of Stewardship and Development, the Chief Operating Officer, or the President.

### **Qualifications**

This is a Grade 11 position (expected starting salary \$45,600 - \$68,800 depending on experience). A Bachelor's degree plus a minimum of 3 - 5 years' experience in gift planning, major gifts, law, finance or trust services is expected. Experience making gift solicitations and knowledge of charitable gift planning, including tax and inheritance law, preferred.

The ideal candidate will have demonstrated skills in goal-oriented constituent relations and experience with progressive responsibility in planned giving and/or managing the flow of legal documentation and financial recordkeeping in legal or financial services. In addition, excellent research and organizational skills, attention to detail and accuracy, and strong oral and written communication skills are necessary.

Able to work some evenings and weekends, as well as travel up to 25% of the time, including to the UUA General Assembly annually at the end of June. If not based in Boston, candidate must be accessible to a suitable transportation hub in the Northeast. High proficiency in the Microsoft Office Suite (Excel, Outlook, PowerPoint, and Word) is required. Experience with Raiser's Edge donor management software as well as wealth screening tools (e.g., WealthEngine) is preferred.

### **How to Apply**

People with disabilities, people of color, Hispanic/Latinx, and LGBTQ candidates are encouraged to apply. Send cover letter and résumé—indicating "Legacy Gifts Officer" in the subject line—via email to [careers@uua.org](mailto:careers@uua.org), via fax to (617) 948-6467, or to Human Resources, UUA, 24 Farnsworth Street, Boston, MA 02210-1409. Email submissions preferred.

### **About the UUA**

The Unitarian Universalist Association is a progressive religious denomination headquartered in Boston's waterfront Fort Point Innovation District with offices in Washington, DC and at the United Nations in New York City. Our faith community of more than 1,000 self-governing congregations brings to the world a vision of religious freedom, tolerance, and social justice. Our normal workweek is 35 hours, we pay 80% contribution towards health insurance premiums, 11% towards retirement (after one year), and have generous paid time-off policies. We are a great place to work and we value diversity. The UUA is an Equal Opportunity Employer. For more information on the UUA, visit us online at [UUA.org](http://UUA.org) and [uuworld.org](http://uuworld.org).