



Catholic Foundation of Southwest Iowa Job Description

Position Title: Director of Planned Giving

Reports To: Executive Director

FLSA Status: Exempt

Summary of Primary Job Function

The Director of Planned Giving will identify, cultivate and steward individuals and couples who have an interest in supporting a Diocese of Des Moines institution primarily through a planned gift. The Director of Planned Giving will be the primary conduit to execute planned gifts and help the organization reach 100 solidified planned gifts by the year 2027 as developed by the organization's strategic plan. Related to the strategic plan, the Director of Planned Giving will also assist toward the goal of 50 donor advised funds by the year 2027.

Essential Duties and Responsibilities

- Working with the Executive Director, develop a comprehensive plan to reach 100 planned gifts and 50 donor advised funds by the year 2027.
- Assist in the identification potential donors who may have interest in establishing a planned gift or donor advised fund.
- Serve as a primary contact for prospects as well as those who already have an established planned gift or donor advised fund.
- Responsible for the cultivation of prospects for planned giving and donor advised funds.
- Working with the Executive Director, develop a Legacy Society for the Catholic Foundation of Southwest Iowa.
- Establish gifts by way of annuities and bequests and insurance plans.
- Establish a network of local attorneys and financial advisors who can assist donors in establishing a planned gift.
- Establish annual goals with the ED for planned gifts and donor advised funds.
- Attend events in which the presence of the Catholic Foundation of Southwest Iowa is necessary.
- Assist marketing efforts in the area of planned gifts.

Supervisory Responsibilities

There are no supervisory relationships for this position.

Position Specific Requirements**Education and Experience**

Bachelor's degree and three to five years of experience in the field of advancement/development.

Computer Skills

Proficient with the Microsoft office products as well as donor related programs such as Raisers Edge.

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.

While performing the duties of this job, the employee is regularly required to sit, stand and walk. Occasionally required to lift 25 pounds and regularly required to lift 10 pounds.

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 will be working in an environment that is quiet to moderate in noise level. This position requires regular travel to parishes throughout the diocese which could include some evenings and weekends.

This position requires a valid drivers' license and the completion of a background check and Virtus training.