

Foundation For The Carolinas - Vice President of Planned Giving

Foundation For The Carolinas (FFTC) is a nonprofit corporation created by and for the people of the Carolinas. Based in Charlotte, North Carolina, FFTC helps individuals, families, nonprofits and corporations make a positive impact on their communities. As a public charity, the Foundation offers favorable tax treatment for gifts and a variety of giving methods to help people achieve their charitable goals. FFTC is one of the largest community foundations in the Southeast and among the top 10 largest in the United States with more than \$900 million in assets.

FFTC is seeking qualified candidates for the position of **Vice President of Planned Giving**. This full time, exempt position reports to the Senior Vice President of Philanthropic Advancement/In-House Counsel, and works collaboratively with the Philanthropic Advancement team members, FFTC staff and volunteers.

General Description:

The VP of Planned Giving is responsible for the identification, cultivation and solicitation of prospects across the FFTC network, for FFTC's family of 13 regional affiliate community foundations in North and South Carolina and also supporting the planned giving and major gifts efforts of the Foundation for the Charlotte Jewish Community, and the Greater Charlotte Cultural Trust. The position requires strategic vision to design and implement a comprehensive planned giving program that focuses on outcomes and aligns with FFTC's organizational goals and community objectives and has the core development skills to implement that vision.

Duties:

- Design a process for the cultivation and stewardship of prospects in our Center for Personal and Family Philanthropy through the establishment of a comprehensive planned giving program; determine staffing needs to appropriately pursue the program; work cross-functionally across teams and fully integrate the program into FFTC's overall development efforts and strategic plans.
- Serve as lead development officer for new nonprofit accounts in Mecklenburg County. Assist nonprofit clients/constituent organizations with all aspects of their endowment development and growth, including fund management and investment, board education and training, donor solicitation and recognition, etc.
- Track and document new prospects and activities and utilize the database to plan, track and report on all planned giving activities.
- Develop a training and education program relating to planned giving for FFTC team members and volunteers to establish a strong expertise in the area.
- Work with the Finance & Donor Relations team to determine planned giving procedures and ensure all giving vehicles are understood and approved.
- Solicit, design and manage complex gift transfers including deferred gifts, real estate, closely held stock and other non-cash gifts, along with SVP-Philanthropic Advancement/In-House Counsel.
- Coordinate legal support as needed for planned giving transactions.
- Work with the Marketing & Communications team to develop an array of communication vehicles to educate prospects, clients and professional advisors about planned giving options, as well as promote the establishment of planned gifts with FFTC.
- Serve as the relationship manager for key clients, prospective donors and boards (including the Professional Advisors Cabinet) to cultivate and strengthen connections.
- Design and implement procedures for extensive communication with planned giving clients in order to personally recognize these donors, as well to ensure that they have a complete understanding of the impact their gifts have on the community.
- Cultivation and management of Professional Advisor relationships to attract new business.
- Manage administrative staff, as needed.

Job Qualifications:

- Bachelor's degree is required.
- Advanced degree (JD, MBA, etc.) and/or certification in a relevant field (financial services, law, technical, accounting, banking) is strongly preferred.
- 10+ years of work experience required with significant experience in development and planned giving, financial services, or relevant field
- In-depth understanding of trusts and estates principles relating to planned giving is necessary.
- Managerial experience, either directly or through influence, is preferred.
- Familiarity with the greater Charlotte region – and issues, organizations, people and resources associated thereto – is preferred.

Skills and Abilities:

- Excellent verbal and written communication skills with attendant proficiency in various computer applications (including word processing, spread sheet, and presentation software).
- Strong organizational, interpersonal, collaborative, managerial and leadership abilities.
- Ability to interact well with diverse populations and constituencies.
- Sensitivity to issues related to planned giving discussions with potential donors, such as age, mortality, health, faith.
- Ability to ask good questions, listen intently for comprehension, build relationships, and develop giving strategies that meet each donor's individual needs.
- Strong command of investment products, vehicles.

Application Process:

Applications will be accepted through **Friday, February 3, 2012**. Interested candidates should send a cover letter and resume to: Anne F. Vail at avail@fftc.org

No telephone calls or mailed, faxed or in-person inquiries please.