



The Denver Foundation

JOB TITLE: Director of Planned Giving and Complex Assets

Reports to: Major Gifts Officer

FLSA Status: Exempt

POSITION SUMMARY:

This director is a fundraising position responsible for managing a portfolio of current and prospective donors, estate and complex gift management and closing. The Director also leads the foundation's fiduciary programs and manages the relationship with our planned giving administrator. This position will serve as a technical resource and subject-matter expert on these topics to the Impact Group and the organization.

The Director will work with other impact group colleagues to steward and recognize current Community Legacy Society members, work with prospects to build the pipeline for planned gifts, and work with staff and legal counsel to help the foundation accept complex assets and bequests. This position will play a key role in the foundation's Centennial Campaign, focusing on endowed gifts.

RESPONSIBILITIES & ESSENTIAL FUNCTIONS

Departmental Collaboration and Engagement (20%)

- Contribute to building and sustaining a positive departmental culture that supports commitment to team goals and core values and fosters individual leadership, accountability, and continuous improvement.
- Work in collaboration with other Impact Group colleagues and Communications staff to tell stories of impact for the community and donor-specific reporting.
- Work with Impact Group colleagues and Communication staff to incorporate planned giving goals into events, convenings, and other opportunities for donor engagement and donor/grantee connection.
- Participate in Community Grants Program review for at least one cycle annually.
- Serve as the department's in-house expert on planned giving and provide strategic counsel on trends, gifting techniques, and complex gift situations.

Fundraising and Donor Services (70%):

- Support the Centennial Campaign in partnership with the Chief Impact Officer and the Major Gifts Officer to develop a comprehensive plan for increasing planned giving opportunities for endowed funds.

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- Grow the endowed assets ratio of the foundation's balance sheet through new endowed funds and bequests to The Fund for Denver.
- Steward a portfolio of the foundation's Community Legacy Society members to ensure they feel appreciated, recognized, and connected to the foundation's work in the community. Host the annual Community Legacy Society stewardship event.
- Identify and cultivate new planned gifts to the foundation, elevating the foundation's value proposition for personalized and impactful charitable legacies. Emphasize the foundation's expertise and flexibility in accepting complex assets (including digital assets, real estate, closely held business interests, etc.).
- Work with Impact staff to develop planned giving as a critical component of a strategic fundraising plan and serve as a partner to other staff in planned giving conversations
- Promote giving to and through The Denver Foundation via personal consulting with donors and advisors about the importance of permanent and flexible funds with a racial equity focus that is collaborative and provides community-based solutions

Complex Assets

- Serve as the primary point person for gift acceptance, including working with donors, advisors, and banks on securities transfers, coordinating with legal counsel on complex assets, and managing and liquidating estate gifts. Coordinate with the Executive Committee to manage incoming gifts using our Gift Acceptance Policy.
- Using appropriate tools, develop gift and financial models for donors and prospects
- Maximize pipeline opportunities through engagement with external organizations, associations, and partners
- Serve as liaison to the Finance, Infrastructure, and Technology (FIT) department, especially around issues on gift acceptance, complex assets, asset liquidation, and audit-level review

Marketing and Promotion (10%)

- Participate in speaking engagements and planned giving seminars, and work with the Communications department to develop marketing materials

REQUIRED QUALIFICATIONS:

- At least seven years of experience in fundraising and/or donor service
- At least five years of experience in planned giving and/or trust/estate administration
- Experience with complex asset donations, including real estate
- Knowledge and understanding of charitable sector tax incentives and gift vehicles
- Knowledge and understanding of the local nonprofit sector

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- A learning orientation that's focused on building a continuous improvement and learning culture through assessment of outcomes and promoting organizational change
- Experience building relationships with people from diverse backgrounds and cultures
- Strong customer service orientation and excellent interpersonal and relational skills
- Excellent verbal and written communication skills
- Excellent problem-solving, organizational, and time-management skills
- High level of confidentiality and professionalism
- Strong attention to detail and customer service orientation
- An unwavering commitment to racial equity
- Belief in the model of community foundations
- Commitment to the philosophy of the Impact Group, bringing together all philanthropy at the foundation

PREFERRED QUALIFICATIONS:

- Experience in major gifts, donor-advised funds, planned gifts, and/or complex assets
- Knowledge of estate administration, wills, trusts, etc.
- Experience with grantmaking and grant administration
- Knowledge of Blackbaud and or other CRM software for move management purposes
- Designations such as Certified Specialist in Planned Giving, Chartered Advisor in Philanthropy, Certified Trust and Fiduciary Advisor, or Certified Financial Planner are preferred but not required

WORK ENVIRONMENT: The position is based in an office environment with a mix of private offices and cubicles.

PHYSICAL DEMANDS:

- Daily communication via phone.
- Frequent extended hours in front of a computer screen with or without accommodations.
- Occasional carrying of objects up to 20 pounds.
- Regular group and public speaking.
- Occasional activities occurring outdoors

ADDITIONAL ELIGIBILITY QUALIFICATIONS:

- Must be authorized to work in the United States

OTHER DUTIES: Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties, or responsibilities that are required of the employee for this position. Duties, responsibilities, and activities may change at any time.

COMPENSATION: This is a full-time, exempt position. The Denver Foundation offers a competitive benefits package, including paid time off, retirement contribution, tuition assistance,

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The Denver Foundation

and medical, life, and disability insurance. The starting salary for this position ranges from \$95,000 to \$105,000, depending on experience.

THE DENVER FOUNDATION'S ANTI-DISCRIMINATION POLICY: The Denver Foundation shall not discriminate on the basis of race, color, religion (creed), gender, gender expression, age, national origin (ancestry), disability, marital status, sexual orientation, or military status, in any of its activities or operations. These activities include, but are not limited to, hiring and firing of staff, selection of volunteers, selection of vendors, and provision of services.

The Denver Foundation practices and champions inclusiveness in our community. We honor the diverse strengths, needs, voices, and backgrounds of all members of our community. Candidates from traditionally marginalized communities are especially encouraged to apply.

JOB DESCRIPTION STATEMENT:

I have read and understand and accept the job description including the qualifications and the requirements of the described position. I certify that I can and will perform the duties and all responsibilities required for this position.

Printed Name:

Date:

Signature: