



The Denver Foundation

JOB TITLE: Director of Planned Giving

Reports to: Major Gifts Officer

FLSA Status: Exempt

POSITION SUMMARY:

The Director of Planned Giving will play a key role in advancing the mission of The Denver Foundation by growing and managing the planned giving program. This position will focus on cultivating relationships with donors, financial advisors, attorneys, and estate planners to secure planned gifts. Additionally, the Director of Planned Giving will steward members of the Legacy Society, ensuring they feel connected to the foundation and its mission while deepening their commitment to future giving. This position will play a key role in The Denver Foundation's Centennial Campaign.

RESPONSIBILITIES & ESSENTIAL FUNCTIONS

Planned Giving Program Development and Management:

- Develop and implement strategies to grow the planned giving program, including marketing initiatives, donor outreach, and educational events.
- Collaborate with members of the Impact Group to integrate planned giving into overall fundraising strategies.
- Maintain expertise in planned giving vehicles, estate planning, and tax benefits to advise donors effectively.

Donor Cultivation and Stewardship:

- Cultivate relationships with prospective planned giving donors through personalized outreach, meetings, and presentations.
- Steward current members of the Legacy Society, ensuring ongoing engagement, appreciation, and communication.
- Develop and execute strategies to recognize and thank Legacy Society members, including the annual legacy event, communications, and personalized interactions.
- 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.
- Receive and review estate notices and fully coordinate the transfer of estate gifts while maintaining proper compliance and reporting.

Collaboration and Partnership Building:

- Partner with the Advisor Relations Officer to build relationships with professional advisors, including attorneys, accountants, and financial planners, to encourage referrals and planned gifts.

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- Partner with internal teams, including Impact Group, Communications and Finance Infrastructure and Technology (FIT), to ensure alignment with organizational goals.
- Represent The Denver Foundation at community events, networking opportunities, and professional gatherings such as Colorado Planned Giving Roundtable
- Participate in The Denver Foundation's Community Grants Program at least once annually.
- Collaborate with legal and consultant to fulfill and close non-cash/gifts of complex assets such as real estate, business interests, retirement assets, life insurance policies, personal property, securities, mutual funds, cryptocurrency, private equity and hedge fund interests

Administrative and Reporting:

- Maintain accurate donor records in the foundation's database, including tracking interactions, gift intentions, and stewardship activities.
- Prepare reports and presentations on planned giving program performance and progress toward goals.
- Ability to report high level planned giving program performance to board of trustees and other committees of The Denver Foundation.
- Ensure compliance with legal, regulatory, and ethical standards in fundraising and gift planning.

REQUIRED QUALIFICATIONS:

- 5-7 years of experience in nonprofit development
- 5 years of experience in planned giving and/or trust/estate administration
- Knowledge and understanding of charitable sector tax incentives and gift vehicles
- 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
- Ability to build relationships with people of diverse backgrounds, perspectives, and cultures

PREFERRED QUALIFICATIONS:

- Experience in major gifts, donor-advised funds, planned gifts, and/or complex assets
- Knowledge of estate administration, wills, trusts, etc.

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- Experience with grantmaking and grant administration
- Knowledge of Blackbaud and or other CRM software for move management purposes
- CSPG, CAP, CTFA, or CFP designation 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 accommodation.
- 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, 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.

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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: