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Position Description

DIRECTOR OF GIFT PLANNING THE FULLER FOUNDATION (Pasadena, CA)

THE FULLER FOUNDATION:

The Fuller Foundation was founded to help individuals and families reach their financial and charitable giving goals and support Fuller Theological Seminary. For more than thirty years, The Fuller Foundation has played a key role in supporting Fuller Theological Seminary and helping generous donors give to advance Fuller's mission. The Fuller Foundation is an independent Christian philanthropic services organization offering gift planning, estate planning, charitable trust administration, donor-advised funds, endowment management and investment management services for Fuller Theological Seminary and its supporters. Through the effective investment of the Fuller Endowment and by providing gift planning and estate planning services to Fuller's supporters, The Fuller Foundation provides ongoing revenue and leadership in support of Fuller Theological Seminary.

For more information about The Fuller Foundation, visit www.fuller.edu/foundation.

FULLER THEOLOGICAL SEMINARY:

In the 70 years since its founding, Fuller Theological Seminary has become a place of rich diversity and theological leadership beyond what its founders could ever have imagined. Now the largest multid denominational seminary in the world, Fuller's more than 3,500 students come from 90 countries and 110 denominations. Three schools (School of Psychology, School of Theology, and School of Intercultural Studies) and multiple locations allow Fuller to offer a full range of master's and doctoral programs in both traditional classrooms and virtual environments. More than 43,000 alumni serve in churches and communities across the globe.

Yet from Charles E. Fuller's original vision until now, Fuller Theological Seminary's core commitment has remained the same: equipping leaders with minds for careful scholarship and hearts for the unchanging, saving gospel of Jesus Christ.

Both The Fuller Foundation and Fuller Theological Seminary work together to bring Fuller's mission to life. The campus will be moving from Pasadena to Pomona and will be undertaking a capital campaign to support the new campus, scholarships, faculty chairs and online learning.

THE OPPORTUNITY:

Reporting to the Executive Director, the Director of Gift Planning has close working relationships with The Fuller Foundation's Chief Operating Officer; The Fuller Foundation's Senior Director, Estate and Charitable Gift Planning Services; Fuller Theological Seminary's Vice President for Development; and Fuller Theological Seminary's Executive Director for Alumni Relations.

The Director of Gift Planning is a management team member of The Fuller Foundation and has direct oversight over all aspects of the gift planning program at The Fuller Foundation for the benefit of Fuller Theological Seminary. Travel, including weekends, is required.

ESSENTIAL FUNCTIONS OF THE POSITION:

- Grow the Charitable Remainder Trust and Donor-Advised Funds programs at The Fuller Foundation, within the guidelines established by The Fuller Foundation and Fuller Theological Seminary.
- Provide prospects and their advisors with detailed information on planned gift vehicles. Work closely with donors during the estate planning process in order to help satisfy their charitable goals while complying with IRS requirements and Fuller's gift acceptance guidelines.
- Sustain and expand the Gift Planning program by identifying, cultivating, soliciting, and stewarding prospects and donors capable of making bequests, life income gifts and other planned gifts. Develop and implement a strategic plan to achieve income and other program goals.
- Steward and expand the Charitable Gift Annuity program.
- Oversee creation, design and production of a comprehensive and high impact marketing plan.
- Create a comprehensive plan to integrate Gift Planning into the cultivation of current donors. Work in close coordination with Fuller Theological Seminary's Vice President for Development and Development Officers to establish long-term relationships with prospects and donors, involving them in the life of Fuller and ensuring continuing cultivation over the long term.
- Manage all aspects of the Grace and Charles Fuller Legacy Circle, including cultivation and recognition events, stewardship, correspondence and other communication and activities.
- Staff and coordinate activities of the Gift Planning Committee of Fuller Theological Seminary Trustees and The Fuller Foundation Board. Recruit ambassadors to be advocates for the Gift Planning program and assist with cultivation, solicitation and stewardship as appropriate. Develop productive working relationships with key ambassadors and professional advisors.

- Work closely with the attorney(s) providing legal counsel in establishing planned gifts. Interface with donors' advisors in establishing gifts, as well as appraisers, real estate agents and other related professionals.
- Working with The Fuller Foundation staff, oversee administration of trusts including income payouts, tax documentation, tracking and reporting. Administer gifts of real estate, life insurance, retained life estates, retirement plan designations, tangible personal property and matured bequests. Administer systems and procedures for the Gift Planning program, including gift tracking and reporting. Manage communication with donors and their legal representatives during life and the probate process; consult with the Chief Financial Officer and legal counsel of Fuller Theological Seminary, as appropriate.
- In conjunction with members of the Gift Planning Committee, maintain The Fuller Foundation's planned gift acceptance guidelines to address the wide array of Gift Planning vehicles currently available to donors.
- Work with the Chief Operating Officer to ensure appropriate management and reporting of deferred gift assets and other planned gifts to the endowment. Coordinate with Fuller Theological Seminary's Vice President of Development and Development Officers regarding deferred endowment gifts that include a naming or other recognition component.
- Develop and manage annual expense plans and income projection.

TRAITS AND CHARACTERISTICS DESIRED:

The successful candidate will have exceptional interpersonal skills with the ability to interact effectively with prospects, advisors, donors and Fuller Theological Seminary development officers. The Director of Gift Planning must have a high level of energy, enthusiasm and dedication to the mission and goals of Fuller Theological Seminary. This individual should have the ability to effectively plan, focus and execute to constantly improve upon the status quo. The ideal candidate will be collaborative, accept responsibility and have the ability to work successfully with a team of fundraising and foundation professionals.

The Director of Gift Planning must have excellent verbal and written communication skills and must be a good listener. Candidates should have the ability to prioritize prospects and participate in high-level gift discussions. Strong strategic planning and organizational skills are essential. This individual must be comfortable working with affluent individuals, mature donors, and financial and legal professionals while developing long-term relationships and gaining their trust and confidence.

Ideally, the Director of Gift Planning will be genuine, self-motivated, attentive to detail, hard-working, innovative and have a goal-oriented work style. A high level of integrity, initiative, creativity and confidentiality is required. The Director should be politically astute, have a good sense of humor and be an open, caring, communicative and confident professional. A high degree of discretion and sensitivity with confidential information and communications is essential.

CAREER TRACK LEADING TO THIS POSITION:

The successful candidate will have a minimum of five years gift planning experience in a progressively responsible position within a nonprofit fundraising department with demonstrated successes in the personal solicitation of major and planned gifts. Candidates with a background as an attorney, CPA or financial advisor will also be considered. Sound knowledge of planned giving instruments including bequests, charitable trusts, gift annuities, pooled income funds, life insurance and gifts of real estate or personal property is required, as is competence with sophisticated software technology, databases and financial reports and analysis. Experience working in close collaboration with a major gifts program or in the context of a capital campaign, is preferred.

EDUCATION:

A bachelor's degree is required with preference given to degrees in law, finance or business.

COMPENSATION:

Annual compensation will be competitive and relocation assistance, if needed, is negotiable. A comprehensive benefits package will be provided.

TO APPLY:

Please direct inquiries, nominations, and applications, including resume and a compelling letter of interest in confidence to:

Karin Berger Stellar
Morris & Berger
500 North Brand Boulevard, Suite 2150
Glendale, CA 91203
Telephone 818-507-1234
kstellar@morrisberger.com

Electronic submission is encouraged.