

University of Alberta
VER Development & Alumni Rel.
Development Associate, Planned Giving

Competition No. - A114948539
Closing Date - Oct 05, 2022

This position is a part of the Association of the Academic Staff of the University of Alberta (AASUA).

In accordance with the Administrative and Professional Officer Agreement, this full-time continuing position offers a comprehensive benefits package found on our Benefits Overview page and annual salary range of \$75,863 - \$126,439.

Location
Work primarily takes place at Enterprise Square.

Working for the University of Alberta
The University of Alberta acknowledges that we are located on Treaty 6 territory, and respects the histories, languages and cultures of First Nations, Métis, Inuit and all First Peoples of Canada, whose presence continues to enrich our vibrant community.

The University of Alberta is teeming with change makers, community builders, and world shapers who lead with purpose each and every day. We are home to more than 40,000 students in 200+ undergraduate and 500+ graduate programs, over 13,000 faculty and staff, 260,000 alumni worldwide and have been recognized as one of Canada's Greenest Employers for over a decade.

Your work will have a meaningful influence on a fascinating cross section of people—from our students and stakeholders, to our renowned researchers and innovators who are quite literally curing diseases, making discoveries and generating solutions that make the world healthier, safer, stronger, and more just.

Working for the Department/Faculty

Ideas. Talent. Purpose.

At the University of Alberta, we begin with people - people with ideas, talent, and purpose.

Every generation is called upon to build a university poised to tackle the challenges of today and tomorrow. We meet those challenges grounded by our roots — yet spurred forward by our profound responsibility to seek truth, solve problems and shape a future unhampered by fixed tradition.

Here we seek out challenges so we can create change. We question and test the status quo and then innovate on it. We collaborate and integrate. We overcome barriers so our ideas can collide and grow.

And, together, we create new purpose.

A career in Development at the University of Alberta positions you as a key player in creating this future. Bring your passion for relationship building and your belief in the power of philanthropy to the University of Alberta, and help deepen our dedication to excellence and extend our record of public leadership by playing a lead role in building a better province, a better Canada, and a better world.

Position

Reporting to the Manager, Major Gifts & Planned Giving, the Development Associate, Planned Giving will have a direct impact on planned giving fundraising results for the University through planned gift cultivation and solicitation.

The Development Associate, Planned Giving helps establish program goals and develops long term philanthropic relationships with planned giving prospects and donors. He/she solicits planned gifts in face-to-face meetings, by telephone, video calls, and correspondence; and coordinates strategic moves to help Development reach its overall financial goals. The Development Associate, Planned Giving works independently and collaboratively as a team member in Development and with colleagues throughout the faculties and the administration.

This position is an opportunity to work with thoughtful donors in creating meaningful philanthropic gifts that will have a profound impact on the University's future ability to deliver on its mission.

Duties

- Planned Giving fundraising from a defined portfolio of individual planned giving prospects.
- Maintaining and using a comprehensive knowledge of gift planning strategies and vehicles, along with an understanding of tax and trust laws applicable to the basic estate planning fundamentals.
- Strategic planning for Planned Giving fundraising.
- Communication and coordination with other External Relations portfolios.

Minimum Qualifications

- Bachelor's degree required.
- Minimum of three years experience in professional fundraising or five years progressively responsible professional experience in fields related to the management of personal wealth within long-term relationships (e.g., Certified Financial Planner, licensed attorney with estate planning experience, bank trust officer working in trust administration)

- Demonstrable knowledge of tax and trust laws affecting planned giving vehicles/strategies and comprehensive/charitable estate planning.
- Proven ability to cultivate and solicit individual gifts on a face-to-face basis.
- Appreciation of the mission of a major research university and the ability to match creatively the university's highest priority needs with the interests of alumni and friends.
- Self-motivated, proactive, energetic, creative, goal oriented.
- Excellent interpersonal skills; excellent written and oral communication skills
- Excellent organizational and time management skills; ability to work towards goals within deadlines.
- Problem solving skills.
- Demonstrated ability to be a contributing member of multi-disciplinary teams.
- Well-developed level of computer literacy.
- Willing and able to travel for work including staffing evening and weekend programs and events.

Preferred Qualifications

- Planned Giving experience in a post-secondary environment or similarly complex organization

Interested applicants may apply to: <https://apptrkr.com/3414883>

The University of Alberta is committed to an equitable, diverse, and inclusive workforce. We welcome applications from all qualified persons. We encourage women; First Nations, Métis and Inuit persons; members of visible minority groups; persons with disabilities; persons of any sexual orientation or gender identity and expression; and all those who may contribute to the further diversification of ideas and the University to apply.