

Associate Director, Gift and Estate Planning

3001 Hospital Gate, Oakville, ON L6M 0L8, Canada

Full-time

Shift Schedule (Hours are subject to change based on operational needs): Mon-Fri – 7.5 hour day shifts

Employment Status: Permanent Full-time

Site Location: Multi-Site (Oakville, Milton, Georgetown)

Compensation: CAD 102,740 - CAD 115,000 - yearly

Company Description

At Oakville Hospital Foundation, we raise funds to support life-saving equipment, leading-edge technology, and innovative care at Oakville Trafalgar Memorial Hospital. From cancer care to mental health to surgical innovation, our work helps ensure that patients in our community have access to world class healthcare, close to home.

We're looking for an experienced and strategic gift planning professional to lead and grow our legacy giving program. As Associate Director, Gift & Estate Planning, you'll be responsible for identifying, cultivating, and stewarding individuals who wish to include the hospital foundations in their estate plans, while also overseeing estate administration.

Reporting to the Associate Vice President, Philanthropy, you'll be the internal subject-matter expert on planned giving and a trusted partner to donors, professional advisors, and colleagues across our three hospital foundations.

While your primary focus will be supporting the Oakville Hospital Foundation, you'll also provide strategic gift planning and estate administration support to the Milton and Georgetown hospital foundations as needed.

This is a hybrid role with flexibility to work remotely. It also involves travel across our three hospital sites and throughout the Halton region to support in-person donor engagement and Foundation priorities.

Job Description

How you'll make an impact:

- Lead the strategy for our gift and estate planning program at Oakville Hospital Foundation, while also supporting legacy giving efforts at the Milton and Georgetown hospital foundations.
- Build relationships with current and prospective planned giving donors, guiding them through the process of including the hospital in their estate plans, whether through wills, securities, life insurance, or other vehicles.

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- Manage estate administration, working with executors, lawyers, and internal teams to ensure timely, accurate, and respectful handling of estate gifts.
- Educate and empower staff and volunteers by championing greater literacy in gift planning concepts and ensuring planned giving is meaningfully integrated into broader fundraising strategies.
- Partner with professional advisors (lawyers, accountants, financial planners) to deepen community relationships and promote legacy giving opportunities.
- Collaborate with communications teams to develop and maintain relevant marketing materials that align with our brand and clearly convey the impact of legacy gifts.
- Monitor and refine policies and procedures related to planned giving and estate administration to ensure compliance, consistency, and a seamless experience for legacy donors and their representatives.

Qualifications

Who You Are and What You Bring

You're a values-driven fundraising professional who understands the long-term impact of legacy giving, and the sensitivity, strategy, and trust it requires.

You bring:

- A deep understanding of planned giving vehicles, estate law, and donor motivations.
- Excellent interpersonal and communication skills, with the ability to translate complex concepts into accessible conversations.
- Experience working with professional advisors and/or managing estate files.
- Strong attention to detail, ethics, and discretion when handling sensitive donor and estate matters.
- Emotional intelligence and empathy, especially in legacy conversations.
- A collaborative spirit and the ability to thrive in a mission-driven team environment.
- Experience with Raiser's Edge or a similar donor database.
- A valid driver's license and access to reliable transportation for travel across Halton.

Additional Information

Why OHF is a great place to work:

We're a small, tight-knit team that shows up for each other with flexibility, trust, and a real sense of shared purpose. Here's what makes working here different:

- **Hybrid model with flexibility:** Remote work is available, with regular in-person presence across our hospital sites and the Halton region to support donor engagement and Foundation initiatives.
- **Support for growth:** We invest in your development, whether that's courses, conferences, or training opportunities.
- **Summer Fridays:** Start the weekend early in July and August.
- **Room to try things:** We value creativity, experimentation, and smart risk-taking. We embrace new tools, digital platforms, and generative AI to help us work smarter and more effectively.
- **Mission with impact:** Every project you touch helps improve healthcare for real people in our community.

Apply at <https://jobs.smartrecruiters.com/HaltonHealthcare1/3743990009954716-associate-director-gift-and-estate-planning>

Please attach your current resume.

Hiring range: \$102,740-\$115,000

Application deadline: October 31st, 2025

Halton Healthcare is an equal opportunity employer who is committed to integrating diversity, equity and inclusion throughout our operations, policies and culture. If you are passionate about what you do, motivated by a job well done, and as committed to excellence, quality and patient satisfaction as we are, we'd like to hear from you. Please attach your current resume directly to this posting.

We thank all those who apply but only those individuals selected for further consideration will be contacted.

Halton Healthcare is committed to providing accommodations for applicants with disabilities. In accordance with the Accessibility for Ontarians with Disabilities Act and the Ontario Human Rights Code, Halton Healthcare will provide accommodations throughout the recruitment and selection process. If you require an accommodation, we will work with you to meet your accommodation needs to ensure your equal participation.

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The Ontario Public Hospitals Act mandates that hospitals establish health surveillance programs for all individuals working within the hospital. This regulation requires proof of immunity for certain diseases and as a result, Halton Healthcare requires all new hires to receive pre-employment medical clearance by our Health, Safety & Wellness team, prior to their start date, as a condition of employment. This includes demonstrating compliance with Halton Healthcare's Immunization Policies.

All new hires must be fully compliant with our Vaccination Policy as a condition of employment with Halton Healthcare. Successful applicants will be required to provide proof of vaccination or proof of a documented medical exemption as part of the hiring process.

All personal information is collected under the authority of the Freedom of Information and Protection of Privacy Act.