



Baycrest

The future of aging is here.

The Baycrest Foundation

has an exciting opportunity for a

Manager, Planned Giving and Estate Administration

Posting Number: 9831

Position Type: Permanent Full Time

Shift Type: Days, Hybrid

Bi-Weekly Hours: 70 Hours, 7 hrs/shift

Union: Non-Union

About Us

The Baycrest Foundation inspires giving to shape the future of aging and brain health. It connects generosity with purpose by supporting research, care and education that improve the lives of older adults and their families.

Building on more than a century of leadership in aging and brain health, the Foundation empowers donors to advance breakthroughs in the prevention of cognitive decline and dementia, earlier detection and improved diagnostics, new treatments and therapeutics, and innovative approaches to dementia care.

Rooted in community and inspired by possibility, the Baycrest Foundation helps donors make a lasting difference in how people live, age and thrive.

Job Summary

Reporting to the Director of Planned Giving and Legal Affairs, the Manager, Planned Giving and Estate Administration is responsible for; managing, stewarding and growing the portfolio of legacy donors and prospects, managing and expanding the legacy campaign strategy in collaboration with the Director of Planned Giving and Legal Affairs, managing estate administration, acting as an internal subject matter expert to educate staff on planned giving vehicles to enhance integrated fundraising, and guiding

professional advisors including lawyers, accountants and financial planners through complex estate and legacy planning discussions. Collectively, these actions strengthen donor retention, expand future donor pipelines and ensure proper estate administration in accordance with legal and CRA guidelines.

Key Responsibilities

Donor Acquisition, Cultivation and Stewardship (60%)

- Manage and steward a personal portfolio of current and prospective donors, guiding them through the journey of legacy giving and providing information about planned giving vehicles and the impact of donor contributions
- Engage and solicit donors in legacy giving conversations, discovery meetings and prepare and present high-quality materials including proposals and stewardship reports to support donor engagement
- Create and update planned giving communications and materials related to appeals, legacy campaigns, surveys, event invitations, different forms of recognition, cards, brochures, info sheets
- Work with fundraising team to build literacy and comfort with planned giving conversations
- Assist in the planning and administration of stewardship events
- Ensure the ongoing maintenance of gifts
- Keep abreast of planned giving trends, tax laws and legislation
- Maintain comprehensive records in the Foundation database and Raiser's Edge, tracking documentation, donor interactions, expected dates of distributions outcomes and progress
- Prepare regular planned giving reports, dashboards and analytics to support performance tracking

Program Strategy (15%)

- Develop and implement annual and long-range strategic and campaign plans to grow and strengthen the Planned Giving portfolio and pipeline in consultation with the Director of Planned Giving and Legal Affairs
- Collaborate with Foundation fundraisers, Communications and Events to integrate planned giving touchpoints into broader donor engagement and campaign strategies;
- Build strong relationships with professional advisors including estate lawyers, wealth planners, trust officers, accountants and volunteers

- Develop education and outreach initiatives to share knowledge with internal and external stakeholders on planned giving vehicles, in consultation with Director

Estate Administration (25%)

- Manage the legal, financial, and administrative lifecycle of legacy gifts (bequests, annuities, trusts, life insurance etc.), from initial notification through to full resolution and track administration activity in Foundation database and Raiser's Edge
- Act as liaison between beneficiaries, executors and professionals including lawyers and accountants and Foundation Finance and Stewardship Departments, to ensure accurate review and processing of legacy gifts, compliance with new and changing legislation and preservation of donor intent
- Review and provide commentary on estate accounts, releases and other legal documents to protect the Foundation's interests
- Generate reports and perform data analytics using Raiser's Edge

Qualifications

- Undergraduate degree or college diploma in business, finance, law, marketing, fundraising or related field
- Canadian Association of Gift Planners (CAGP) training considered an asset
- CFRE or similar designation considered an asset
- Minimum of 5 years of progressive fundraising experience, with at least 3 years specifically focused on planned giving and/or estate administration
- Demonstrated success identifying legacy prospects, closing planned gifts and stewarding long term donor relationships
- Experience in estate administration processes, probate and receipting procedures
- Experience guiding donors through sensitive, values-driven legacy conversations with empathy and discretion
- Proficiency in donor CRM systems such as Raiser's Edge or similar
- Proficiency in Microsoft Office Suite and collaboration tools
- Superior analytical and verbal and written communication skills with the ability to engage effectively with legal and financial professionals, donors, families, and internal stakeholders
- Ability to multitask and manage multiple priorities and projects, timelines and initiatives independently while working effectively with others
- Ability to collaborate effectively with colleagues and leadership

Compensation

At Baycrest, we take pride in ensuring our compensation structure is internally equitable and compliant with pay equity legislation. We believe compensation should be transparent, equitable, and reflective of your experience and growth. Our salary ranges are structured to support progression, from learning the role to demonstrating full proficiency.

The salary range for this position is \$96,218 to \$120,273 per year.

Your placement within the target hiring range will depend on your job-related knowledge, skills, abilities, and relevant education and experience, as well as considerations such as market conditions and internal equity. The starting salary will be determined using these factors to ensure fairness and consistency across the organization.

Why Baycrest

Baycrest puts people first, offering rewards and programs to support your health, well-being and growth. *(Eligibility varies by role and employment status.)*

- Competitive pay
- Extended health and dental coverage
- Defined-benefit pension plan (HOOPP)
- Paid vacation and statutory holidays
- Maternity and parental leave top-up programs
- Employee and family assistance program (EFAP)
- On-site fitness facilities
- Employee discount program
- Tuition reimbursement

Please apply by following this link:

<https://jobs-ca.silkroad.com/Baycrest/Careers/jobs/5793>