ADVISOR, LEGACY GIVING

Location: Remote
Travel: Occational
Reporting to: Manager, Legacy Giving
Salary Range: $79,000 - $85,000
This posting is for an existing vacancy.

JOB PURPOSE

Reporting to the Manager, Legacy, the Donor Advisor, Legacy Giving is responsible for engaging a portfolio of legacy donors and prospective legacy donors. The Donor Advisor will identify, cultivate, and engage potential legacy donors through meaningful, values-based relationships. This role thrives in donor meetings, takes a creative, and demonstrates expertise in guiding supporters through the full legacy giving prospect journey.

The Donor Advisor, Legacy Giving provides clear, accessible information about legacy gift opportunities while ensuring donors seek appropriate legal and financial counsel for technical guidance. The advisor will cultivate and steward trusting, mission centered relationships with supporters. The Donor Advisor ensures that donors' intentions are clearly understood and well documented and provides ongoing stewardship for those who have already included World Vision Canada in their plans—upholding their wishes and strengthening their connection to the impact their legacy will make.

KEY RESPONSIBILITIES

- Strategic Development: Develop and implement planned giving strategies with an emphasis on identifying, cultivating and soliciting gifts. In consultation with the Manager, Legacy Giving, assesses program needs, and contributes to the development and implementation of plans to build the planned giving pipeline.
- Seek out new and creative ways of connecting with new legacy prospects, including collaboration and coaching of other World Vision Canada Advisors.
- Donor Engagement: Cultivate and maintain relationships with current and prospective donors, guiding them through the legacy giving journey and providing them with information about planned giving options and the impact of their contributions.
- Education and Outreach: Share knowledge with internal and external stakeholders on planned giving and planned giving vehicles
- Portfolio Management: Maintain a portfolio of donors and prospects and lead them through the donor cycle with moves management strategies.
- Work with Manager, Legacy Giving and the Coordinator, Legacy to create an Allied Professional Program and engage them on a consistent basis.
- Administration: Oversee the administration and stewardship of life insurance policies.
- Assists in creating and updating planned giving communications and materials e.g. appeals, surveys, event invitations, recognition, cards, brochures, info sheets, etc.
- Acts as backup support to the Coordinator, Legacy on gifts of securities.

World Vision

KEY CROSS FUNCTIONAL INTERFACES

• Data Insights & Analytics: Assist in developing predictive modeling to generate lists for prospecting campaigns and develop next-best-action strategies, offerings and activities; Use tools and templates to understand donor pain points, diagnose the causes, and improve the planned giving/legacy donor journey
• Philanthropy Enablement Service Marketing: Provide input into operational plans across the organization regarding collateral messaging on Legacy giving, based on customer preferences
• Experience Marketing Channels: Create upsell/cross sell strategies and leverage best practices
• Philanthropy teams: Educate, inform, collaborate and coach to integrate planned giving messaging with a clear call to action that generates interest, leads and revenue
• Legal and/or Finance: Works to ensure timely and accurate processing of contributions, tax receipts and reporting (where required) and compliance with CRA and other applicable legislation

QUALIFICATIONS

- University degree in a relevant field (marketing, communication, finance, accounting) or relevant experience.
- 7-10 years of experience in fundraising, client management, or relationship-based sales.
- CFRE, CAGP, CMA, CPA, CFP, LLB certification or designation, an asset
- Extremely strong relationship building and business development skills
- Demonstrated experience with multi-stakeholder relationships and complex systems
- Very high emotional and spiritual intelligence to engage in sensitive conversations
- Has an appetite to continually learn and develop skills
- Understanding of the donor/client lifecycle (identification, cultivation, solicitation, stewardship).
- Proficiency with CRM software and data analysis.
- Strategic thinking and proactive problem-solving.

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