

Job Posting

Estates Manager, Gift & Estate Planning

Full-Time, Permanent

2021-06

What you'll do

Our Gift & Estate Planning program is growing and looking forward continuously. We are looking for a talented Estates Manager to join our collaborative team who will enjoy managing and maintaining careful oversight of our estate administration processes providing maximum annual revenue for BC Children's Hospital Foundation.

Reporting to the Director, Gift & Estate Planning, this position is responsible for the day-to-day duties associated with the administration of estates, life insurance gifts and other types of designated legacy gifts to ensure the timely receipt of legacy gifts. The Estates Manager is responsible for meeting annual revenue goals, currently exceeding \$6-10 million.

In this Manager role, you will assess the need for legal assistance and in collaboration with the Director, recommend next steps for complicated or contested estates, and will collaborate with the Director for all newly proposed gifts of life insurance. You will work collaboratively with a breadth of other Foundation teams to ensure forecasting, recognition, and allocation of legacy gifts reflects the donor intent and needs of the hospital.

More specifically you will:

- Oversee all active estate files, acting as the main point of contact for contested estates in collaboration with the Director, and actively manage a select portfolio of non-contested estates.
- Correspond with executors, lawyers, and others to ensure that the status of administration is up to date and funds are flowing in a timely manner, and ultimately ensuring donor intent is fulfilled.
- In consultation with the Director, recommend and incorporate legal assistance as appropriate.
- Monitor revenues, reconciling monthly results and adjusting strategies as necessary to meet annual objectives.
- Recommend and implement digital record keeping and process improvements to facilitate centralized database records and reports for revenue and estate status.
- Supervise the work of the Estate Administrator, providing training, feedback and guidance to ensure the effective and timely follow up of a large volume of non-contested estates being directly administered by that role.
- Support the Director for all inquiries for new insurance gifts, to ensure compliance with gift acceptance policy.

Why you'll enjoy this role

You will enjoy this role if you are:

- A person who jumps with joy knowing that each estate is different to the last one.
- Excited by each precise administration detail that reflects your highly organized nature and knowledge of best practices.
- Master of concise correspondence and friendly reminders while keeping the hot button on revenue flow.
- Highly collaborative and equipped with a juggling strategy to manage multiple stakeholder responses with accuracy and focused precision for seamless service delivery.
- A strategic thinker providing objective analysis and discernment for the cadence of legal assistance.
- A major data nerd who jumps in to digitize records and process while maintaining an eye on the possible.
- A heart to care for the executors whose labours to fulfill their loved one's legacy wishes are equally important to recognize and appreciate.

What you bring

As the ideal candidate, you demonstrate exceptional communication skills and have advanced knowledge of estate law and CRA tax receipting regulations pertaining to legacy gifts. You have exceptional organizational skills with proven ability to recognize and enhance process efficiencies, ensure accurate and detailed record keeping, and work collaboratively in a team environment. You demonstrate intermediate accounting skills, with proven ability to review and approve estate accounting presented by executors and the ability to handle sensitive and confidential information appropriately and with discretion.

In addition, you will have:

- Minimum five to seven years of direct experience leading estate administration, or as a trust officer.
- Post-secondary diploma or degree in a related field. Advanced education in estate administration in a Canadian and B.C. context is preferred.
- Advanced computer literacy skills with Microsoft Office applications applied to the preparation of documents and with databases, Raiser's Edge NXT experience is an asset.
- CAGP education or membership is an asset.

What you can expect

Due to the pandemic, most of our team is currently working remotely from home. If you are selected on this opportunity, you can expect to work from home most days but may be asked to come on-site occasionally.

What we do

At BC Children's Hospital Foundation, we're on a quest to ensure every kid in the province receives the best health care imaginable. As a fundraising organization, we inspire communities and people to support BC Children's Hospital, along with its world-class research institute, mental health facility and rehabilitation centre.

Our work makes a profound difference. From helping get the boldest research ideas off the ground to supporting the most advanced equipment, together we are pushing the boundaries of what's possible in children's health care. This is no small task—which is why we're looking for passionate people to join our team and help propel our mission forward.

Join us

We believe that anything is possible. And that permeates every action we take. As a team, we push ourselves to constantly aim higher in our work. We try new things and challenge the status quo. We respect each other and act from a place of compassion in everything we do.

While we take our work seriously, we're also big on taking care of our team. We offer perks like a nine-day fortnight schedule and flexible hours, topnotch health and dental benefits, and a commitment to professional development.

We think it's a pretty amazing place. Others agree—we're proud to say that we've been recognized as one of BC's Top Employers for ten years in a row.

Seem like the right place for you? Join us and help kids shine. Apply online at by **February 26, 2021** at www.bcchf.ca/careers