Manager Estate Administration

Application Link: https://careers.uoguelph.ca/job/Guelph-Manager-Estate-Administration-ON-N1G-2W1/1290329547/

General Purpose

Alumni Affairs & Development (AA&D)'s purpose is to maximize philanthropic support for the University of Guelph's mission of creating unique solutions for the challenges facing our world. We achieve this purpose by building the kind of deep and sustained relationships with our donors, alumni and friends that increase awareness of, engagement with, and investment in the University of Guelph's work. As a member of this campus-wide team, the Manager, Estate Administration epitomizes the department's shared values of respect, empowerment, integrity, appreciation, and forward focus.

The University of Guelph is currently planning to launch its first fundraising campaign since 2014. The campaign aims to expand on the University's recent fundraising growth so that AA&D becomes a team that consistently raises $ 75 M a year by 2030 (a record $ 55M was raised in FY24/25). By aligning donor passions with the university's ambitious goals, the campaign will boost revenue, elevate the university's global profile, deepen donor relationships, and create a highly developed culture of philanthropy across the University community. Institutional leaders and volunteers will be highly engaged in advocating for the university's global impact and the vital role of philanthropy in achieving this vision.

Duties and Responsibilities

Reporting to the Senior Manager, Legacy Giving, the Manager, Estate Administration is responsible for the expert administration and management of complex estate and testamentary gifts to the University, from initial notification through to full resolution. This role requires the analysis of complex legal situations and application of significant judgement to manage more than 70 open estate files and securing approximately $7.5 - $8 million annually in realized estate donations.

The role requires independent assessment and analysis of a variety of legal documents (e.g., wills, trusts, court filings) to identify issues, determine entitlement, and fulfill university requirements. The role is the senior contact to liaise with estate executors, trustees, legal and financial professionals, and requires independent assessment and judgment at an experienced and advanced level.

The role manages compliance and risk management of estates through specialized understanding of estate law, trust administration, and CRA guidelines to ensure compliance with legal and regulatory requirements and ensures that all estate gifts are fulfilled according to the donor's intentions with professionalism, compassion, and accuracy.

The position requires a high degree of autonomy, discretion, and emotional intelligence to navigate complex legal, financial, and interpersonal situations—often involving grieving families, executors, and allied professionals (lawyers, accountants, trust officers, insurance professionals). The incumbent will work collaboratively with a myriad of partners across campus, including the office of the AVP, Financial Services, university legal counsel, academic and administrative partners and other department colleagues in colleges and portfolios across campus.

In addition to estate administration, this role manages the portfolio of University-owned, donor-funded life insurance policies. Reviewing and interpreting annual statements and ensuring timely premium payments to keep policies in force. Proactively identifies policies at risk and leads risk assessment audits with external experts.

This role is key in safeguarding the University's future philanthropic revenue and reputation through detailed estate oversight, industry-aligned best practices and legal compliance.

Requirements

The university recognizes that no one individual will have the following skills/experience in equal measure but the qualifications below will be used to assess the suitability of candidates throughout the process:

- An undergraduate degree.
- Five years related experience with estate administration within a charity or as a Trust Officer or law clerk or equivalent experience in related fields.
- Law clerk diploma and/or MTI/STI designation is considered an asset.
- Knowledge of estate law, trust administration, and CRA guidelines to ensure compliance with legal and regulatory requirements.
- Emotional intelligence to navigate complex discussions with grieving family.
- Experience with Blackbaud CRM or other relational databases is an asset.

- Excellent organizational skills.
- Strong analytical/accounting skills and the ability to exercise sound judgment in dealing with complex issues.
- Advanced interpersonal communication skills (verbal and written).
- Excellent time management, prioritization, and organizational skills.
- Ability to effectively handle multiple tasks and priorities with a great deal of accuracy.
- Ability to adapt to changing processes and requirements.
- Professional attitude, tact, and diplomacy.
- Initiative and ability to handle competing demands and problem solve in a short amount of time.
- Proficiency with Microsoft Office Suite including, Microsoft Word and Excel.
- Knowledge of institutional databases and good data management practices.
- Experience in a fundraising environment considered an asset.

Please include a cover letter along with your resume in your application.

At the University of Guelph, fostering a culture of inclusion is an institutional imperative. The University invites and encourages applications from all qualified individuals, including from groups that are traditionally underrepresented in employment, who may contribute to further diversification of our Institution.

Posting Date: 09/18/2025
Closing Date: 10/09/2025