



The Salvation Army – Canada and Bermuda Territory Job Description

Position Title:	Territorial Manager of Estates
Division:	Territorial Headquarters
Ministry Unit/Dept:	THQ – PRD
Location:	2 Overlea Blvd., Toronto
Reporting To:	Territorial Director of Development
Job Family:	PRD
Generic Job Title:	Territorial PRD Manager
Pay Band:	7
Date Approved:	June 18, 2019

The Salvation Army is an international Christian church. Its message is based on the Bible; its ministry is motivated by love for God and the needs of humanity.

Mission Statement

The Salvation Army exists to **share the love of Jesus Christ, meet human needs and be a transforming influence in the communities of our world.**

Core Values:

The Salvation Army Canada and Bermuda Territory has four core values:

- Hope:** We give hope through the power of the gospel of Jesus Christ.
 - Service:** We reach out to support others without discrimination.
 - Dignity:** We respect and value each other, recognizing everyone's worth.
 - Stewardship:** We responsibly manage the resources entrusted to us.
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POSITION PURPOSE SUMMARY:

The Territorial Manager of Estates is responsible for the strategic management and administration of a comprehensive Estates program, as part of the Development team for The Salvation Army Canada and Bermuda Territory. The Manager of Estates manages a team responsible for all estate gifts, reporting, allocation and best practices for estate gift administration, always creating the best possible experience for supporters.

ACCOUNTABILITIES:

KEY ACCOUNTABILITIES:

1. Estate Review

- In collaboration with the Planned Giving and the entire Development team, create a donor centered experience for estate gift administration that builds relationships with planned giving donors, executors, and family
- Lead the review of open estate files for the continued administration of the file in an effort to receive estate donations in a timely manner
- Manage the correspondence to follow-up on estate files as required



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- Supervise estate review processing and response for complex estates
- Identify resolution options and liaise with stakeholders

2. Estate Allocation

- Manage the process for final distributions received
- Attend monthly Legacy Allocation meetings, reporting on all estate income for allocation

3. Estate Systems

- Manage the process for estate administration and legacy allocation for the Territory
- Proactively raise the profile of The Salvation Army and its Christian mission, values and ministry through a comprehensive estates program that administers an average of \$40 million in revenue annually
- Establish and continue to achieve the highest levels of donor fulfillment, and engagement of external stakeholders including executors, family, solicitors and other professionals
- Work collaboratively with THQ Development, divisional staff and internal stakeholders for strategy, effective processes that meet the Territory goals for estate administration and allocation
- Promote planned giving and charitable estate administration through professional and industry networks, including Canadian Association for Gift Planners, Leave a Legacy and other opportunities as they arise
- Design procedures and processes as well as maintaining territorial-wide estate systems

CRITICAL RELATIONSHIP MANAGEMENT:

- **Internal relationships:**
 - Member of the THQ Development team; work cooperatively as part of the Territorial Communications to serve The Salvation Army within Canada & Bermuda Territory
 - Key working relationships with Territorial Manager of Planned Giving for the strategic growth of Planned Giving for The Salvation Army
 - Working relationship with THQ Finance and the Legacy Allocation Committee
- **External relationships:**
 - Responsible for working relationships with external donors, executors and stakeholders to administer estate gifts that total an average of \$40 million annually

MANAGERIAL/TECHNICAL LEADERSHIP RESPONSIBILITY

- Reports directly to the Territorial Director of Development
- Manages Estates staff

FINANCIAL RESPONSIBILITY:

- \$25,000 or less



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WORKING CONDITIONS:

- Working environment is typically in the office with possible travel (20%) annually to divisional offices for training

The above responsibilities must be discharged in accordance with The Salvation Army’s Mission Statement, in a professional manner, exemplifying Christian standards of conduct.

EDUCATION AND EXPERIENCE QUALIFICATIONS:

Education, Qualifications and Certifications:

- University degree or equivalent
- CFRE and/or Trust & Estate (TEP) training is preferred

Experience and Skilled Knowledge Requirements

- 5-7 years of experience in planned giving, estates and/or legal
- Detail-oriented, with strong organizational and planning skills
- Experience in all aspects of estate administration, tax and legal considerations

Skills and Capabilities:

- Ability to lead projects to meet expected outcomes
- Appreciation and acceptance of the values of The Salvation Army, its Mission Statement and Fundraising Code of Ethics
- Demonstrated ability to manage several projects with varying deadlines
- Ability to develop systems & processes that are donor centered, while ensuring compliance with all policies and regulations
- Experience in building and managing a team approach to problem solving
- Strong interpersonal skills and a team player
- Strong organizational, administration, telephone and communication skills
- Skill in preparing written reports and presentations
- Ability to prioritize and manage multiple tasks and a variety of demands
- Ability in budget management and working with external service providers
- Proficiency in Microsoft Office applications and donor database systems

Sign-off by Incumbent:

I have read, understood, and accept the position description outlined above.

Employee Name (please print)

Employee Signature

Supervisor/Manager

Date



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Please Note: Signing of this document endorses the fact that I have read, and agree to adhere to: The Salvation Army Mission and Values, Job Description, Policy and Procedures, and other objectives of The Salvation Army, including confidentiality with regard to all client, staff and program information.