

World Vision



Are you looking for more than a job? At World Vision Canada we offer challenging careers that change the lives of children all over the world and it will change yours too. Come and be part of a team of over 500 Canadians with a vision for the world: Life in all its fullness for every child.

You will experience Christian faith in action helping to make real and lasting change in the lives of the world's most vulnerable children. Join the World Vision Canada team and be part of a powerful and effective force for good: For Children. For Change. For Life.

Job Description

The Legacy Giving Advisor is responsible for informing and executing primarily phone campaigns on legacy giving that span many planned giving options in Canada. S/he will also cultivate potential customers and perform ongoing stewardship through the appropriate means with a breadth of knowledge on various paths of planned giving.

- Informs and executes on customer experiences that fulfill customer needs and desires through appropriate levels and channels of engagement, stewardship, and cultivation
- Conducts difficult life stage conversations via telephone, in person and through email; providing the right balance of information while adhering to legal regulations
- Develops expertise in the use of systems, tools, and processes that support legacy giving
Implements the strategy around acquisition, stewardship, and cultivation for legacy gift customers
- Builds meaningful relationships with potential and existing customers while incorporating messages of impact in stewardship and cultivation
- Prepares documentation required for planned/legacy gifts
- Works with Legal and/or Finance to ensure timely and accurate processing of gifts, tax receipts, and reporting (where required)
- Actively manages and cultivates portfolio of legacy/planned giving customers including prospects, customers, financial partners, legal partners, etc.
- Informs planned giving messages and tactical plans for the market into channel initiatives with Manager, Leadership & Legacy Gifts
- Executes phone campaigns, aiming to meet/exceed key performance indicators as defined by the Manager, Leadership & Legacy Gifts
- Applies knowledge of Canada Revenue Agency (CRA) and compliance requirements for financial products into legacy giving outreach, including the ability to present face to face to legacy customers and Allied Professionals as may be necessary
- Continuously improves knowledge on financial products; discusses planned giving options of financial products with financial/legal professionals and allied professionals
- Supports the Transformational and Leadership Gift Advisors in building a competency in Legacy giving expertise; builds awareness of legacy giving practices within World Vision Canada (WVC)
- Communicates the brand narrative of World Vision effectively

Job Requirements

- Post-secondary education in a relevant field
- Proven excellence in spoken and written English
- Minimum 3-5 years of customer service, sales or fundraising experience with a heavy focus on relationship building
- Previous legacy/planned giving experience is an asset
- Achieved or working towards achievement of the CFRE designation
- Extremely strong relationship building and business development skills
- Results focused
- Demonstrated experience with multicultural fundraising/selling
- Expertise in communication of difficult life stage topics and coaching others to have these conversations
- Familiarity with financial products
- Proficient in CRM systems

How to Apply

World Vision is committed to the protection of children; all offers of employment will be conditional upon the successful completion of reference checks and a Police background check. Qualified candidates must be able to demonstrate a commitment to the core values and mission of the World Vision partnership.

World Vision Canada welcomes and encourages applications from people with disabilities. Accommodations are available on request for candidates taking part in all aspects of the selection process.

Interested applicants are asked to complete an online application via our careers website.

<https://canr54.dayforcehcm.com/CandidatePortal/en-US/wvc/Posting/View/2144>

This posting will remain open until the position is filled.