

Church Universal & Triumphant
Group: Prosperity and Development Team
Team: Prosperity and Development Team

JOB TITLE: Legacy Developer
Reports to: Senior Legacy Developer and President
Job Status: Full-time, non-exempt, hourly
Hours of Work: 40 hours per week
Pay Range Dependent on skills and experience

Benefits: Eligibility for the employee Health Plan, life insurance, paid vacation, sick leave, and 401(k). Additional information about these benefits is available from Human Resources.

Legal Holidays Observed: New Year's Day, Presidents' Day, Memorial Day, Independence Day, Labor Day, Thanksgiving and the day after, Christmas Day.

SUMMARY

Works collaboratively with the Senior Legacy Developer and reports to the President and Senior Legacy Developer. Works cross-functionally with the current Prosperity and Development Team and Waters of Life Capital Campaign Director. The Legacy Developer will increase legacy income and build a sustainable legacy pipeline of giving and assist in planning, developing and delivering legacy fundraising strategies. Local travel and visitations with our members are required in the State of Montana, in the Pacific Northwest and elsewhere as needed.

ESSENTIAL DUTIES AND RESPONSIBILITIES

1. Assists in the development and implementation of legacy strategic planning with Senior Legacy Developer and the current Prosperity and Development Team.
2. Creates a legacy development strategy for constituents in collaboration with the Senior Legacy Developer.
3. Nurtures relationships; builds and manages relationships to raise funds from potential legators, which includes local and national travel.
4. Maximizes future income through legacy development using a variety of legal instruments including charitable remainder trusts, wills and bequests, non-cash asset donations, stocks and gift appreciated securities.
5. Assists Senior Legacy Developer with marketing materials, social media and advertising campaigns as part of a public relations strategy that is consistent with current organizational branding.
6. Expands the target audience and assists Senior Legacy Developer with community relations, speaking engagements, newsletters and charitable events in collaboration with the president.

7. Develops and maintains strong internal relationships to ensure legacy marketing is incorporated into the yearly mission fulfillment plan and all cross-organizational team plans.
8. In collaboration with the current Prosperity and Development Team, devises and manages donor profiles to better understand the profile of potential legators and prepares appropriate individualized communication plans for them.
9. In collaboration with the Senior Legacy Developer, ensures proper management of reporting and forecasting of budgets to participate in budgeting and financial management.
10. Provides accurate forecasts of projected legacy income, based on commitments and perceived intentions and communicates information on a regular basis to the Senior Legacy Developer and the President.
11. Ensures acknowledgments and notifications of gifts are dealt with efficiently, appropriately and in a timely fashion.
12. Develops reports and analysis using the database to better inform decision-making and targeting.
13. Keeps informed of all developments in legislation and regulatory control which cover legacy fundraising activity.
14. Engages effectively with key internal and external stakeholders, both in person and via telephone and email, across a variety of constituencies including current CUT membership, staff and volunteers, local community and other potential donors.
15. Contributes to and supports other team and departmental work as appropriate.

QUALIFICATIONS AND EDUCATION

A bachelor's degree in business, marketing, or liberal arts with demonstrable fundraising experience. Other experience includes, but is not limited to, public relations, prospecting, sales, interpersonal communication, business development and negotiation. Persuasive writing, strong verbal communication and the ability to interact at an executive and interpersonal level.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

SKILLS AND WORK EXPERIENCE

Strong people skills, including the ability to motivate, inspire and facilitate members for testamentary legacy giving. Knowledge of our organizational practices and beliefs with commitment to the organization. Well-developed relationships with members are a plus.

Accredited fundraising qualification such as diploma or certification in fundraising and a knowledge of legal instruments, related tax laws and donor distribution advantages is preferred. CUT will provide equivalent opportunity for professional development and training in legacy

fundraising skills and certification. Computer and database skills (MS Word, Excel, Outlook and donor database), budgeting skills and ability to work as part of a team are essential.