

Planned Giving Officer

Area: Polio and Philanthropy

Reports to: Director of Gift Planning

Classification: Exempt

Organization Overview

Rotary is 1.2 million inspired business and professional leaders, in 35,000 Rotary clubs and more than 200 geographical areas united daily across cultures and occupations addressing illiteracy, disease, hunger, poverty, and lack of clean water. The fervent idea exchange celebrates diverse perspectives and facilitates positive change. Passion and engagement abound at Rotary International. In exchange for hard work and dedication, our employees are rewarded with competitive salaries, flexible schedules, comprehensive benefits, and job enrichment. We offer all this and more. Come join us. Visit www.rotary.org to learn more.

Rotary's Commitment to Diversity

One of Rotary's values is diversity, which we define as embracing diversity in thought, culture, and perspective. As such, we welcome and encourage highly-qualified candidates with diverse experiences and backgrounds to apply.

Overview

Rotary has embarked upon a campaign to grow its endowment to \$2.025 billion and is adding additional Planned Giving Officers to its seasoned team of professionals. The objectives of the Planned Giving Officer Team are to (1) consult as a specialist on structured gift discussions including life income agreements, (2) solicit estate commitments and (3) steward high-level donors. This position is located in Evanston, IL with quarterly travel to a defined territory.

You Will Have

- An amazing personality that can balance attention to detail with entrepreneurial optimism
- Bachelor's or advanced degree
- Minimum 6 years of experience working in a fund development role, preferably in planned giving or endowments
- Knowledge of planned giving vehicles such as Charitable Gift Annuities, Charitable Remainder Unitrusts, Individual Retirement Accounts, and Donor Advised Funds preferred

- Familiarity with the tax economics of charitable giving, estate law basics, and investment concepts
- Appreciation for the wisdom and experience of mature donors; ability to develop long-term meaningful relationships while supporting their philanthropic and financial objectives
- Base knowledge of GDPR and professional discretion regarding data and donor privacy
- Excellent listening abilities
- Unquestionable integrity
- Strong analytical and organizational skills

You Are Good At

- Written and oral communication
- Building cultivation plans and tracking your progress
- Giving and receiving constructive feedback
- Prioritizing your workload and following up on assignments
- Making informed decisions
- Working autonomously and in a team

You Will Be Responsible For

- Developing an expert-level understanding of the mission and programs of The Rotary Foundation
- Sharing your enthusiasm for how Rotary is changing the world
- Becoming a guru in structured gift options including Bequests, Life Income Agreements, Donor Advised Funds, asset selection, tax economics of charitable giving, etc.
- Personally developing and maintaining a portfolio of key planned giving prospects with a capacity to make gifts of US\$50,000 and more
- Working closely with colleagues and volunteers
- Strengthening the development of department objectives; brainstorming innovative tactics to meet individual and group goals.
- Collaborating with volunteer committees and traveling to regional Rotary Institutes, district conferences and other Rotary events, as assigned.
- Other duties as assigned

Why Work For Rotary?

- Your work helps people around the world live happier, healthier lives
- Generous medical, dental, and vision benefits package
- Progressive 401k matching contributions
- Above market and generous paid time off package
- Tuition reimbursement
- Professional development opportunities
- Work closely with influential mentors
- Opportunity to participate in international conventions, hosted in a new country each year
- On-site cafeteria and coffee bar with special pricing for Rotary employees
- Regular happy hours and other social events hosted by staff society
- Flextime-several different work schedules to choose from
- Potential to work from home on occasion
- Close to CTA, Metra, a variety of retailers, and many delicious food options