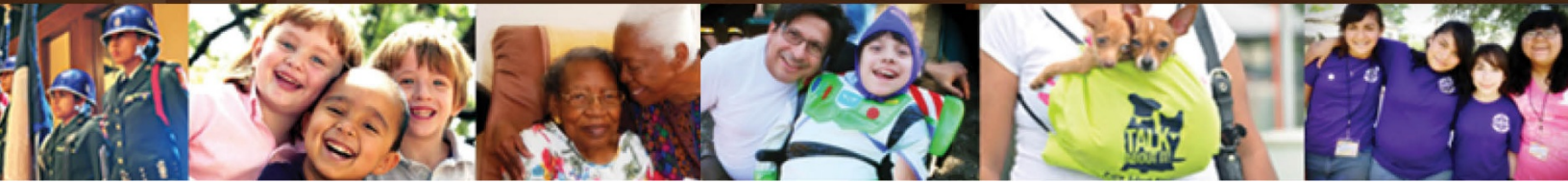




San Antonio Area Foundation

Where Giving and Community Connect

...helping donors achieve their charitable goals for the greater benefit of the community.



DEPARTMENT Development and Donor Services (DDS)	TITLE: Development Officer - Gift Planning	REPORTS TO: Vice President, Development and Donor Services
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THE AREA FOUNDATION

The San Antonio Area Foundation has served as the sole, designated community foundation for the San Antonio area for over half a century, growing to become one of the Top 20 foundations in the nation based on asset size. The Area Foundation helps donors achieve their charitable goals, managing more than 500 charitable funds approaching \$1 billion in assets. Coordinating efforts with numerous area nonprofits, the Area Foundation serves as a collaborative leader, connecting donors to address key community issues and investing in our future. Since 1964, over \$400 million for scholarships and grants have been awarded to enhance the quality of life in our region. Learn more about your community foundation at saafdn.org.

Our core values are: Community, Integrity, Passion, and Excellence.

SUMMARY OF RESPONSIBILITIES

The Development Officer for Planned Giving will serve as the Area Foundation’s principal planned giving liaison with legal and financial advisors, and with individuals/families with deferred and planned gift interests. The position reports to the Vice President, Development and Donor Services. He/she will be responsible for the planning, implementation and evaluation of the Area Foundation’s outreach to professional advisors, including attorneys, accountants, financial planners and others. The position also works closely with the Vice President on the identification and cultivation of prospects for planned gifts and for providing for stewardship of such gifts in conjunction with the Area Foundation’s finance department.

The position requires a thorough background and successful professional record in major and planned giving and strong interpersonal and communications skills; a high level of confidence and comfort in making presentations and representing the Area Foundation to potential donors, professional advisors, board members of the foundation and nonprofit organizations; and the ability to articulate to diverse constituencies the Area Foundation’s mission, structure, charitable fund products and the benefits of giving back to the community through the Area Foundation.

COMPETENCIES/SKILLS

The requirements listed below are representative of the knowledge, skill and/or ability required.

- **Must adhere to Core Values: Community, Integrity, Passion, and Excellence.**
- Excellent interpersonal and communications skills, both oral and written
- Strong knowledge of a range of planned giving vehicles and tax laws related to charitable giving
- Strong computer skills in word processing database programs; knowledge of Raisers Edge preferred

- Self-motivation, high energy, sense of humor, creativity and an appreciation of the role of philanthropy in the community
- Demonstrated ability to work with individuals, volunteers and other staff

QUALIFICATIONS

- Bachelor's degree required
- Minimum of five years' experience in the development field, including substantial work and success in soliciting major gifts and marketing planned gifts

TASKS/FUNCTIONS

- Develops and maintains relationships with potential and current donors; identifies and cultivates potential donors for the purpose of securing major and deferred gifts to the Area Foundation
- Develops plans and implements programs to cultivate relationships with attorneys, accountants, trust officers, financial planners, brokers, insurance agents and other advisors in order to encourage gifts to the San Antonio Area Foundation
- Conducts prospect research, identification, solicitation and recognition for all new funds
- Manages all direct mail initiatives related to planned giving tools
- Serves as an in-house technical resource on financial and tax issues relating to gifts, and stays abreast of federal and state laws concerning charitable giving
- Makes presentations to professional advisors and other community groups on the benefits of using the San Antonio Area Foundation to accomplish charitable objectives
- Assists individuals/families in establishing philanthropic estate plans
- Plans, implements and evaluates the planned giving marketing communications including seminars, newsletters, legacy society, etc.
- Along with the Vice President of Development, Donor Services and Communications, serve as a key staff liaison with the Area Foundation's Board of Directors
- Participates in the creation of annual development department plans, goals and strategies
- Maintains prospect and donor information in database
- Works with the Donor Relations Officer on special events as necessary

PHYSICAL DEMANDS / WORKING CONDITIONS

The physical demands and characteristics of the work environment described here are representative of those occurring in the performance of the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the essential functions of this job, the employee must occasionally lift and/or move up to 40 pounds. Specific vision abilities required by this job include close vision, distance vision, peripheral vision, depth perception, and the ability to adjust focus.

TO APPLY

Submit cover letter, resume and references to aburns@saafdn.org with the job title in the subject line.

The San Antonio Area Foundation is an Equal Opportunity Employer.