

The **Greater Milwaukee Foundation (GMF)** is how Milwaukee works together. For over a century, we have helped generous people give back to the community. Together with donors and partners throughout the region, the Foundation invests in the potential of people and places, supports community-grown solutions and strives to end the systemic racism that holds our region back. Through the power of transformative philanthropy and social change, we are focused on shaping a future where everyone thrives – *a Milwaukee for all*.

You can make a difference, as we are seeking an Associate Director of Gift Planning! The Associate Director of Gift Planning is responsible for managing an assigned portfolio of Foundation constituents. The incumbent stewards existing professional advisers (attorneys, accountants, financial advisers) in the Herbert J. Mueller Society, cultivates new professional advisers and oversees a portfolio of donors and prospects while maintaining strong relationships with Foundation staff, local community leaders and all stakeholders. This position also oversees the administration process of planned gifts and manages the Foundation’s legacy pipeline.

Key Responsibilities:

- Serves as liaison to professional advisers with the ultimate goal of developing referrals and obtaining gifts.
- Manages a portfolio of donors and prospects with a focus on establishing new funds and legacy promises, developing and executing on strategies to bring them closer to the Foundation’s mission with the goal of stewarding donors and increasing their investment.
- Develops strategies to engage donors, prospects, advisers and volunteers of color to be implemented as part of the Foundation’s commitment to advancing racial equity and inclusion.
- Oversees the Foundation’s Young Professional Adviser Council, which includes recruiting new members, providing relevant programming and coordinating periodic evaluations to ensure valuable content.
- Works creatively with current and prospective clients and donors and their advisers to create charitable gifts that meet each donor’s financial, estate planning and charitable goals and aligned with the Foundation’s strategic priorities.
- Works with Director of Gift Planning to help lead the activities of the Herbert J. Mueller Society, the Foundation’s recognition society for professional advisers.
- Stays apprised of the latest developments in income, gift and estate taxes as they relate to charitable giving.
- Delivers educational presentations and marketing materials to promote charitable giving and the benefits of partnering with the Foundation to staff, the Board, Legacy Society members, current and prospective donors, nonprofit organizations and professional advisers.
- Represents the Foundation at adviser, Legacy, nonprofit, donor and prospect events.
- Engages with estate planning councils and other adviser organizations to cultivate relationships with professional advisers and increase estate planning knowledge.
- Serves as lead in the following aspects of the planned giving process, in consultation with the Director of Gift Planning: reviews all planned giving policies, practices and procedures to ensure legal compliance and internal efficiencies; secures fund documentation and/or written gift confirmations from new, current and planned gift donors; oversees the estate administration of planned gifts as they mature.
- Obtains fund documentation and/or written gift confirmations from new, current and planned gift donors.

Qualifications:

- Bachelor's degree in related field required, such as finance, accounting, marketing or law; Graduate degree strongly preferred.
- Five (5) or more years of experience in estate or financial planning, charitable fund development, cultivation of professional advisers, donors or institutional advancement, philanthropic advising or other experience with transferrable skills and expertise required.
- Experience in the cultivation and securing of major and planned gifts or experience working with high net worth clients in a sales environment strongly preferred.
- Demonstrated commitment to racial equity and inclusion.
- Must have a valid driver's license, proof of auto insurance and reliable transportation.
- Bilingual skills in Spanish desirable.
- Demonstrated knowledge and skills in planned giving, estate planning, tax laws, professional advising and charitable giving.
- Demonstrated ability to develop strong and credible relationships with donors/clients.
- Knowledge of laws, regulations and processes related to charitable giving and nonprofit operations.

Due to COVID-19, our offices are currently operating with the majority of employees working remotely. The successful candidate may be required to work remotely in the interim. We recognize that at this moment, during the pandemic, it is a uniquely difficult time for most people and we aim to be as flexible and supportive as possible in both the recruitment for and onboarding of this position.

Salary Range: \$69,000 - \$88,000

Application Deadline: November 1 - submit resume, cover letter and salary requirements when [applying](#).

Benefits: We offer an excellent benefit package, which includes health, dental, vision, flexible spending, life insurance, 403(b) retirement plan, paid time off (PTO), educational assistance and more!

The Greater Milwaukee Foundation is an equal opportunity employer and encourages people of diverse backgrounds to apply. We celebrate diversity and are committed to creating an inclusive environment for all employees.