

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 a Director of Gift Planning! The Director of Gift Planning is responsible for managing an assigned portfolio of GMF constituents, stewarding existing donors and cultivating prospective donors while maintaining strong relationships with Foundation staff, local community leaders and the professional adviser community. The incumbent oversees all aspects of the planned giving process and professional adviser marketing, as well as provides educational opportunities to Foundation staff and external constituents about deferred gifts and changes in tax laws. In addition, this role oversees the Gift Planning team and the work of the Associate Director of Gift Planning, providing oversight to the estate administration process.

Key Responsibilities:

- Serves as GMF's principal liaison with professional advisers and Legacy Society members, with the ultimate goal of developing referrals and obtaining planned gifts from prospective donors.
- Manages a portfolio of donors and prospects, developing and executing on strategies to bring them closer to the Foundation's mission with the goal of stewarding donors and increasing their investment.
- Implements an annual plan for the cultivation and education of professional advisers of all racial backgrounds in the greater Milwaukee area, which includes representing GMF at adviser and prospect events, conducting individual and group meetings, offering educational presentations, and publishing digital and print-based marketing materials to increase referrals.
- Supervises the Gift Planning team; serves on GMF's Management Team and the Development and Philanthropic Services Leadership Team.
- Oversees the activities of the Herbert J. Mueller Society, the Foundation's recognition society for professional advisers.
- Develops and executes strategies to engage donors, prospects, advisers and volunteers of color to advance the Foundation's commitment to Racial Equity and Inclusion.
- Delivers educational presentations and marketing materials to promote charitable giving and the benefits of the Foundation to staff, the Board, Legacy Society members, current and prospective donors, non-profit organizations and professional advisers.
- Works creatively with current and prospective donors and their advisers to create charitable gifts that meet each donor's financial, estate planning and charitable goals and align with the Foundation's strategic priorities.
- Provides oversight to the planned giving process, in concert with the Associate Director of Gift Planning.
- Serves as lead for inquires for and administration of complex gifts, including but not limited to life insurance policies, real estate, privately held securities and other assets.
- Participates in estate planning councils and other adviser organizations in order to cultivate relationships with professional advisers and increase estate planning knowledge.
- Engages in volunteer management work, including preparing for and presenting at the Development and Philanthropic Services Committee and working with Campaign Committee volunteers as requested.

Qualifications:

- Bachelor's degree in related field required, such as finance, accounting, marketing or law. Graduate degree or special certification (e.g. CTFA, CPA, CFP) strongly preferred.
- Seven (7) or more years of experience in estate or financial planning, charitable fund development, cultivation of professional advisers, donors or institutional advancement, corporate philanthropy or philanthropic advising required.
- Experience in the cultivation and securing of major and planned gifts or experience working with high net worth clients in a sales environment required.
- Demonstrated commitment to racial equity and inclusion.
- Must have a valid driver's license, proof of auto insurance and reliable transportation.
- Supervisory experience preferred.
- Bilingual skills in Spanish desirable.
- Demonstrated knowledge and skills in planned giving, estate planning, tax laws, professional advising and charitable giving.
- Knowledge of laws, regulations and processes related to charitable giving and nonprofit operations.
- Demonstrated ability to develop strong and credible relationships with donors/clients.

Application Deadline: April 27 - 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!

Due to COVID-19, our offices are currently operating with 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.

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.