

Director of Planned Giving and Estates

Development Department

Friends of the Israel Defense Forces (FIDF) provides care and support for the soldiers of Israel and builds a better future for them and for the State of Israel. Founded in 1981 by a group of Holocaust survivors, FIDF is headquartered in New York City has 20 regional offices across the US and Panama. The FIDF touches the lives of more than 80,000 soldiers, veterans and bereaved family members each year.

Job Summary:

The Director of Planned Giving and Estates holds primary responsibility for supporting the organization's long-term financial strength by promoting gifts of bequests, charitable gift annuities, charitable remainder and lead trusts, endowments, life insurance and similar gifts that reflect legacy planning and deferred giving opportunities. The position reports to the Chief Development Officer (CDO)

Educational Requirements:

- Bachelor's degree from an accredited university is required

Skills, Knowledge and Experience:

- A minimum of least 7 years' experience in planned giving required
- Working knowledge and experience with PG Calc or Crescendo required
- Working knowledge and experience with Excel required, and with PowerPoint preferred
- Demonstrated success in promoting planned giving opportunities required
- Knowledge of current laws regarding taxability of planned gifts and familiarity with deferred giving strategies essential
- Exceptional interpersonal skills with all age groups required
- Strong oral and written communication skills required
- Experience with planning and executing a National Legacy Society Campaign a plus
- Background in law, accounting or financial planning a plus

Essential Job Duties:

- Identify and cultivate planned giving prospects and promote this valuable fundraising tool
- Meet with donors in 1:1 meetings as well as large group presentations

- Prepare donor gift annuity and trust proposals including complex gifting strategies as necessary to close the gift
- Provide stewardship of existing planned giving donors
- Monitor estate proceedings to protect FIDF's interests and serve as the primary contact for executors and estate attorneys
- Serve as resource to FIDF's 20 regional chapters to secure planned gifts and related donor engagement. Provide the detailed follow through to close the gift. Educate regional development staff to recognize planned giving opportunities and to provide prospect leads. Travel to the chapters as necessary.
- Lead the planned giving Legacy Society initiative, including enrollment and recognition events
- Responsible for creating outreach materials with the Marketing Department including digital, printed, direct mail, and print media
- Arrange for presentations to estate attorneys and financial planners in cooperation with the regional chapters.
- Work in coordination with the other initiatives of the Development Department to ensure maximization of our donor development efforts
- Prepare Excel and PowerPoint schedules summarizing gift and revenue results for National Board meeting presentation as well as for internal review with senior management
- Supervise and direct the Manager of Planned Giving
- Other duties as requested