



**WILLIAM & MARY**

CHARTERED 1693

OFFICE OF UNIVERSITY ADVANCEMENT

### **Associate Director, Gift Planning Administration**

#### **Mission Statement**

University Advancement creates the conditions for opportunity – human, financial & experiential – by garnering and stewarding the resources that advance William & Mary.

The William & Mary Foundation’s defining and essential mission is to support the university’s people and programs. By seeking private support, and then diligently managing those funds, the W&M Foundation advances and furthers the work of William & Mary’s students and faculty — providing vital resources for scholarships, professorships, research, and program funding.

Consistent with the University’s shared services agreement with the William & Mary Foundation, this position is assigned 25% effort to support Foundation Services, LLC, a subsidiary of the William & Mary Foundation.

#### **Position Summary**

The Associate Director, Gift Planning Administration is a vital player on the principal gifts and gift planning team in the Office of University Advancement at William & Mary. Planned gifts represent a significant portion of W&M’s philanthropic engagement and activity, and this position will be an important part of this high-performing team.

Reporting to the Director of Gift Planning Administration, the Associate Director is responsible for assisting with the processing of planned giving gifts, the administration of estate and trust gifts, and internal reporting. As a key administrative contact and resource for advancement colleagues, donors and their advisors, the Associate Director assists the Director in drafting gift agreements and additional documents and administering planned gifts for the benefit of the university and its related programs and foundations.

The Associate Director will provide exceptional service to donors, advisors, colleagues, and allied professionals in gift planning. They will collaborate with team members to prepare and present customized language for wills, trusts, and retirement plan designations that support the university and its related foundations. The Associate Director will also be responsible for drafting and reviewing confidential deferred gift agreements, in collaboration with the University Recording Secretary and leadership, and for coordinating the sharing of drafts with colleagues, donors, or the donor’s legal counsel.

The successful Associate Director, Gift Planning Administration will be an innovator who will lead with university values to foster a culture of belonging that embraces all people and perspectives. This is a hybrid position based in Williamsburg, Virginia, that offers a flexible work environment.

Review the full position description with all job duties under the “Featured Job Opportunities” on the University Advancement recruitment website: <https://advancement.wm.edu/come-work-with-us/open-positions/index.php>

### **Required Qualifications**

- Bachelor's degree or substantial experience and expertise directly related to the position.
- Strong working knowledge of fundraising principles with the ability to help Gift Officers move donors from the identification stage to documented planned gifts.
- Comprehensive understanding of gift planning vehicles and familiarity with the legal terms and processes associated with each vehicle.
- A result oriented, self-starter with demonstrable high level of independence, strong work ethic and integrity with the ability to work effectively and successfully with minimal supervision.
- Excellent writing skills and the ability to draft accurate documents.
- Expertise in a variety of data management (CRM and internal tracking systems) and software applications to include MS office (Word, Excel, PowerPoint and Outlook).
- Strong problem-solving skills with the ability to effectively resolve issues, while exercising sound judgment and diplomacy in all interactions.
- Ability to manage multiple relationships and balance competing priorities, complex situations within tight deadlines.
- Excellent organizational qualities with the ability to track multiple tasks, deadlines, and deliverables with efficiency and accuracy.

### **Preferred Qualifications**

- Prior work history in the legal field or a law firm specializing in estate planning.
- Experience in gift planning administration in higher education.

### **Conditions of Employment**

- This position is subject to additional hours beyond the typical workday to include evenings and weekends.
- This position may require the ability to pick up and move objects weighing 25 pounds on occasion.

### **Position Duties**

#### **Gift Planning Services, 35%**

- Assist the Director of Gift Planning Administration in aiding colleagues who are soliciting or accepting planned gifts from individual donors.
- Manage the gift acceptance process for gifts of tangible assets to the university and its related foundations.
- Provide gift planning support and services to donors, professional advisors, colleagues, and diverse constituent groups.
- Draft and review, with the University Recording Secretary, confidential deferred gift agreements for the university and its related foundations.

- Coordinate sharing gift agreement drafts with donors, donors' counsel, or colleagues.
- Review documentation and valuation forms for revocable testamentary provisions credited to fundraising totals.

#### Estate and Testamentary Trust Administration, 35%

- Assist in the administration and tracking of all retirement plan, estate, and testamentary trust distributions for the benefit of the university and its related programs and foundations.
- Ensure the highest standards are maintained for the Gift Planning Office to serve as the administrative contact for trusts and estates.
- Assist with the recording of testamentary distributions, draft posting instruction memos to Gift Accounting or Investment Management, as applicable.
- Create new accounts when necessary, create audit trail, and monitor estates and trusts to protect the interests of the university and its related foundations.

#### Data Management & Administration, 30%

- Manage life insurance administration in coordination with the Gift Planning Administrator.
- Execute data entry and management for all planned gifts/proposals and donor background information and produce and audit confidential specialized gift planning reports, including summary reports for the Executive Director and key administrators.
- Maintain accurate records, both electronic and paper files, of testamentary distributions, tangible gifts, life insurance policies, and deferred planned gifts and provide summary reports when requested.

#### **Equal Opportunity Statement**

William & Mary values diversity and invites applications from underrepresented groups who will enrich the research, teaching and service missions of the university. The university is an Equal Opportunity/Affirmative Action employer and encourages applications from women, minorities, protected veterans, and individuals with disabilities.

#### **Background Check Statement**

William & Mary is committed to providing a safe campus community. W&M conducts background investigations for applicants being considered for employment. Background investigations include reference checks, a criminal history record check, and when appropriate, a financial (credit) report or driving history check.

#### **Benefits Summary Statement**

William & Mary offers our employees a full array of benefits including retirement, health insurance with options for expanded dental and vision along with group and optional life insurance with coverage for spouse and children, flexible spending accounts, and an EAP (Employee Assistance Program). Our employees enjoy additional university benefits such as educational assistance, professional development, wellness benefits, and a robust holiday schedule. All employees have access to fitness facilities on

campus. Staff members also have access to the university libraries, and much more. To learn more, go to:  
<https://www.wm.edu/offices/uhr/benefits/index.php>



In addition to salary, William & Mary provides wonderful benefits and perks that add to an employee's total compensation package. Below is a comprehensive overview of benefits for the **Associate Director, Gift Planning Administration** with the top salary of **65,000, commensurate with experience**. This position is classified as operational which defines the benefits package.

## HEALTH & LIFE

Our **health plan options** are designed to support a healthy lifestyle for you and your family. As state employees, we have multiple health insurance plans to attend to our employees' health needs. The Commonwealth's Department of Human Resources Management (DHRM) administers all plans. For in-depth descriptions and cost of premiums for each plan, including optional buy-ups, visit [DHRM's Health Benefits website on plan choices](#). *New employees are required to make health coverage selections within 30 calendar days of hire date.*

**Optional Life Insurance** For benefits-eligible employees, a group life insurance policy is provided for you. The amount is equal to your annual salary rounded to the next highest thousand (when applicable), and then doubled. This is a double indemnity policy that would pay twice the value of the insurance in the event of an accidental death. .

**Long Term Care Insurance** The Virginia Retirement System (VRS) has contracted with Genworth Life Insurance Company to offer Long-Term Care Insurance to Commonwealth of Virginia employees. Coverage is participant-paid (directly billed to employees and not payroll deducted) for a monthly benefit allowance of covered long-term care expenses.

## TIME OFF

In addition to 12 paid holidays per year, you will accrue between 12 and 27 days per year of **annual leave**, which may be used however you wish, including vacations and other personal purposes, or to cover other kinds of leave for which you have zero balance.

A benefit unique to William & Mary eligible employees is an additional 16 hours of paid leave per year for **community service leave**, for services within their communities through school assistance or as a volunteer member of a community service organization, so you can get out there and be a part of the broader community.

## RETIREMENT

In addition to Social Security, contributions will be made for you to a Virginia Retirement System (VRS) plan. The VRS plan that you are eligible to participate in is based on your hire date.

### **VRS Hybrid Plan (for employees hired on or after January 1, 2014 with no prior state service)**

This is a combination of a defined (or fixed) benefit retirement plan and defined contribution (or 401k-like) plan. Members must have at least five years of service and have attained age 60 to retire early with reduced benefits. To receive full benefits, the member must be of social security age and have at least five

years of service credit or when age and service credit equal at least 90. The benefits received under the defined benefit portion of the plan are determined by salary, length of service, age at retirement, and the retirement income option selected (e.g., survivorship, partial lump-sum optional payout). The benefits received under the defined contribution portion of the plan are determined by the contribution level and fund performance over time. More information about the [VRS Hybrid Plan](#) can be obtained at the VRS website.

## ADDITIONAL PERKS

In addition to the perk of living in Williamsburg, close to beautiful parks, nature trails, fabulous shopping, Second Sundays on Merchant's Square, farmer's markets and more, William & Mary employees enjoy these additional perks.

## EMPLOYEE EDUCATIONAL ASSISTANCE

The [Educational Assistance Policy](#), permits eligible faculty and staff who participate in the VRS or ORP retirement program to take advantage of educational opportunities. Participation in the program is by approval only. An eligible employee may be approved to enroll in an academic credit course of instruction at William & Mary and have the current tuition paid for or waived within the terms of the policy. An eligible employee may also be approved to enroll in an academic credit course of instruction at an institution other than William & Mary and have the current tuition reimbursed under the terms of the policy, provided the courses are not offered at William & Mary and are directly related to the employee's job.

## AFLAC

Employees can choose from different optional policies for coverage such as cancer insurance, intensive care insurance and disability, etc. These are optional plans. For additional information please call 1-800-992-3522 or visit [AFLAC](#) on the web.

## DISCOUNTS

W&M ID Card Local Discounts: Employees can use their ID card at participating local vendors in the Williamsburg area to receive discounts on meals, lodging and purchases.

Colonial Williamsburg Collegiate Pass: W&M employees are eligible for a discounted Colonial Williamsburg Collegiate Pass, which includes the use of Colonial Williamsburg's bus system and admission into any of the exhibits in the restored area. Present your W&M ID at the Colonial Williamsburg Visitor's Center or ticket offices to get your discounted pass.

Statewide Discounts: [DHRM List](#) information is online.

## OTHER GREAT PERKS

Use of W&M Facilities: Many university facilities, including the [recreational facilities](#) and [the libraries](#), as well as [fitness classes](#), are available to employees. Contact specific facilities for details.

SunTrust Bank: SunTrust Bank provides benefits to William & Mary employees. For questions and assistance, please contact your local Jamestown Road SunTrust Branch (1186 Jamestown Road, Williamsburg, VA 23185) at 757-603-4749.

Child Care: [Williamsburg Campus Child Care](#) (WCCC) is a nonprofit organization which has had a successful program in Williamsburg since 1981.

CommonHealth: [CommonHealth](#) of Virginia offers programs available to all full-time William & Mary employees and dependents.

Legal Resources: [Legal Resources](#) is a program that allows employees to pay \$16.50 per month for legal services. Visit the website to learn more.