WILLIAM & MARY

UNIVERSITY ADVANCEMENT

Gift Planning Administrator

Mission Statement

In the Office of University Advancement, we create the conditions for opportunity – human, financial, & experiential – by garnering and stewarding the resources that advance William & Mary.

Dual Hat Language - The William & Mary Foundation advances the university's highest aspirations by securing private support, guiding a multi-asset investment portfolio and offering strategic leadership. In this work, we propel the university toward national preeminence and help shape a future worthy of its history.

Consistent with the university's shared services agreement with the William & Mary Foundation (WMF), this position is assigned 25% effort to support WMF with the responsibilities outlined below.

Position Summary

The Office of Gift Planning handles complex testamentary gifts (bequests), outright gifts to William & Mary including real estate, charitable distributions from IRAs, closely held stock, and deferred gifts of trusts and charitable gift annuities.

The Office of Gift Planning ensures that donors, gift officers, other university employees, executors, trustees, donors' professional advisors and others who request assistance from the Office of Gift Planning obtain prompt, knowledgeable, thoughtful, thorough and exceptionally helpful assistance.

The Gift Planning Administrator reports to the Director of Gift Planning Administration and processes and tracks bequests, life income gifts, gifts of real property, tangible gifts and the

administration of life insurance policies in accordance with established guidelines and procedures. Data management and reporting is a key component of this position. The Gift Planning

Administrator will also be responsible for establishing workflow processes and tracking systems, maintaining a procedural manual and developing a check and balances system to maintain compliance.

Specific responsibilities include (but are not limited to):

- Assist with the analysis of estate files and administration correspondence received for appropriate data concerning estate matters.
- Develop ticklers for the different stages of each estate and planned gift. Process, administer and track revocable provisions.
- Complex data maintenance and working with the Associate Director of Gift Planning Operations to create regular and ad hoc reports.

Resourcefulness, multitasking, meeting deadlines, and working with a team are essential for success in this role.

The Gift Planning Administrator will lead and foster a culture of belonging and trust that embraces all people and perspectives and ensures alignment with William & Mary's institutional values and strategic priorities. This is a hybrid position based in Williamsburg, Virginia, which offers a flexible work environment.

Learn more about University Advancement and view the full position description for this job on the University Advancement recruitment website: https://advancement.wm.edu/come-work-with-us/open-positions/index.php.

About the University

Founded by Royal Charter in 1693, William & Mary is America's first university. The Alma Mater of the Nation brings together the breadth of a public liberal arts and sciences education with the innovation of a preeminent global research university. Here, curiosity deepens into wisdom, shaping lives of meaning, distinction and purposeful impact. For more than 300 years, the university has convened great minds and hearts to meet the most pressing needs of our time.

Required Qualifications

- Associate's Degree or post high school education, training or certifications.
- Prior experience working in a professional office environment
- Exceptional organizational and time management skills for managing multiple tasks with competing priorities and deadlines.
- Demonstrated computer proficiency with a variety of software applications, including a strong command of MS Word and Excel and familiarity with databases.
- Excellent customer service ability to work collaboratively as an effective team player and provide prompt service to internal and external customers.

- Strong communication and writing skills to prepare letters, edit documents and produce reports and work effectively and discreetly with a variety of internal and external
- constituencies.
- Demonstrates strong analytical skills with the ability to read and analyze complex documents.
- Demonstrated ability to track and compile data and produce reports in a variety of formats
- Ability to understand and use databases and other tools available to choose the appropriate means to satisfy user requirements

Preferred Qualifications

- Bachelor's degree in Accounting, Business or a related field.
- Experience as a paralegal working in estate and trust planning.
- Experience analyzing complex documents..
- Knowledge of tangible gifts and charitable distributions from IRAs
- Experience in trust and/or estate administration, charitable gift administration or
- processing, or experience in banking, law, mortgage loan companies, title companies, non-profit organizations or college/university administration.
- Experience with process improvement and establishing processes and workflows for improved efficiency
- Experience analyzing data and producing reports.
- Knowledge of or the ability to learn the terminology and assets, vehicles and methods used in charitable gift and estate planning.
- Experience with charitable illustration software such as PGCalc
- Familiarity with using a relational database, such as Blackbaud or other comparable system

Conditions of Employment

- This is a non-exempt position, eligible to receive overtime in accordance with the Fair Labor Standards Act.
- This position may be subject to overtime during high peak times, as directed and approved by the supervisor.
- Strict adherence to confidentiality is required in this role.

Position Duties

Processing, Administration & Tracking Planned Gifts 35%

- Assist with the processing, administration, and tracking of bequests, life income gifts, and gifts of real property in accordance with established guidelines and procedures.
- Analyze financial and narrative documents to compile gift planning data.
- Assists with the analysis of estate files and administration correspondence received for appropriate data concerning estate matters. Develop ticklers for the different stages of each estate and planned gift.
- Process, administer and track revocable estate provisions.
- Request new accounts from the University Recording Secretary as needed for bequests received.
- Draft suggested Testamentary Gift Agreements for review by the University Recording Secretary.
- Provide backup to the Director on gift planning administration duties that include memos, correspondence, and form preparation related to retirement, trust and estate distributions.
- Create regular and ad hoc reports, often including Excel spreadsheets, and gift administration documents in Word.
- Conducts audits for mathematical and data entry accuracy.

Reporting & Administration 35%

- Create regular and ad hoc reports, often including Excel spreadsheets, and gift administration documents in Word.
- Conducts audits for mathematical and data entry accuracy.
- Establish workflow processes and tracking systems. Keep updated a “how to" manual of Gift planning administration responsibilities and implement a check and balances system for validation.
- Provide backup for Director on some gift planning administration duties that include memos and letters regarding distributions from trusts and estates.
- Respond to inquiries from prospective donors, gift officers, other university employees, executors, trustees, donors’ professional advisors and others who request assistance from the Office of Gift Planning. Other duties as assigned.

Handle Insurance Transactions & Tangible Gifts 15%

- Respond to insurance premium notices and insurance premium checks received with appropriate correspondence.
- Work with William & Mary Foundation personnel regarding life insurance, obtaining policy status and annual reports and maintaining accurate records.

- Process, administer, and track routine gifts of tangible personal property in accordance with established guidelines and procedures.
- Prepare tangible gift agreements. Involve the Director of Gift Planning Administration when necessary.

Review & Update Existing Proposals 15%

- Review specified CRM reports to update existing gift planning proposals. Utilize PGCalc gift illustration software to perform gift planning calculations.
- Review new gift planning CRM proposal requests in partnership with the Director of Gift Planning Administration and create new Gift Planning proposals in CRM.

Equal Opportunity Statement

EEO is the Law. Applicants can learn more about William & Mary's status as an equal opportunity employer by viewing the "Know Your Rights" poster published by the U.S. Equal Employment Opportunity Commission. https://www.eeoc.gov/know-your-rights-workplace-discrimination-illegal

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?type=none