



Position Title: Planned Giving Officer
Department: Development
Reports to: Vice President of Development
FLSA: Part-Time, Exempt

Position Summary:

Researches, organizes and directs efforts to assist donors in making long-range financial plans for the benefit of the Charlotte Symphony.

Essential Functions:

1. Proactively identifies, cultivates, solicits, and meets with prospective planned giving donors.
2. Develops and executes detailed marketing plan.
3. Regularly meets with planned giving committees, working in partnership with them to build membership in the CSO's legacy society.
4. Oversees and maintains appropriate office procedures for planned giving efforts.
5. Establishes and maintains contact with lawyers, CPAs, trust officers, insurance underwriters and other professional advisors regarding planned giving.
6. Develops and utilizes a donor prospect file and keeps this file current.
7. Plans and executes legacy society stewardship event(s)

Other Responsibilities:

1. Participates in staff training and development activities as directed.
2. Performs other duties as required.

Requirements:

1. A Bachelor degree required.
2. Minimum seven years' experience in multi program fundraising environment.
3. Experience in successfully managing and marketing a gift planning program.
4. Excellent oral, written and interpersonal skills.
5. Ability to collaborate and interface with a diverse group of people.

To Apply:

Email a thoughtful cover letter outlining your desire and qualifications for this position; salary history and requirements; and resume to mhamilton@charlottesymphony.org using the subject line "Planned Giving Officer".

No telephone calls / No agency resumes accepted. EOE M/F/V/D