

Planned Giving Committee Job Description

Your Organization

PURPOSE

The Planned Giving Committee is responsible for cultivating and soliciting current and future gifts to Your Organization that require the use of estate planning techniques or that have significant financial and tax consequences.

COMPOSITION

- Community leaders who are dedicated to Your Organization
- At least one of the members of the committee should also be a member of the board of directors

RESPONSIBILITIES

- Understand Your Organization's case for planned gifts
- Gain general knowledge of planned giving concepts
- Make a planned gift commitment to Your Organization
- Develop and monitor planned giving activities for the year
- Make annual planned giving presentation to the board
- Assist in education and recognition of donors
- Know planned giving ethics
- Open doors to staff for planned giving presentations to financial and legal professionals, volunteers, and others

QUALIFICATIONS FOR MEMBERSHIP

- Dedicated to Your Organization
- Willing to complete own planned gift arrangement within a year of joining the committee
- Capable of identifying prospects with the ability and willingness to make a planned gift to Your Organization
- Willing to meet four times a year for two hours and participate in planned giving events as required
- Willing to ask for planned gifts face-to-face.