

JOB DESCRIPTION CHARITABLE GIFT COORDINATOR

POSITION SUMMARY

The Charitable Gift Coordinator will provide administrative support to the Planned Giving Advisors to serve new and existing clients with excellence; helping them coordinate new gifts and bridge to the client service team. Duties include gift processing, transaction facilitation, customer service, administrative support and working closely with the advisors to help bring cases to a successful completion. This position reports to the CDO.

ESSENTIAL FUNCTIONS

- Assist Planned Giving Advisors in the best possible way including correspondence, scheduling meetings, filing, documentation, coordinating/hosting of events, and general administrative duties.
- Provide administrative support to Planned Giving Advisors to ease their load. Coordinate. Streamline.
- Assist with administrative duties related to our Planned Giving Services.
- Provide Crescendo management support to Advisors.
- Carry out administrative duties such as creating presentations, copying, binding, scanning, and taking meeting notes.
- Proofread and edit printed and electronic materials as directed.
- Engage in client and prospect communication in support of advisor work, goals & objectives.
- Communicating with customers via phone, email, and website. (MBLF and Foundation)
- Maintain physical and electronic files, databases, and contact lists.
- Process complex gifts and issue receipts.
- Assist, track, and issue IRS Forms 8282 & 8283.
- Maintain expectancy gift tracking.
- Produce annual gift reports and advisor reports.
- Preparation of BED documents.
- Work with other team members to further the ministry of MB Foundation.
- Coordinate events or functions, occasionally outside of regular business hours.
- All other duties deemed necessary.

REQUIREMENTS

- AA degree in business, communications, or a related field, or equivalent work experience.
- Exhibit strengths in service and administration.
- Organized and detail-oriented, completing tasks in a timely manner with precision and a high degree of accuracy.
- Ability to handle sensitive information and maintain confidentiality and discretion at all times.
- Demonstrate ability to prioritize conflicting needs while handling matters expeditiously, proactively, and following through on projects to a successful completion.
- Strong verbal and written English communication skills with experience in editing, proofreading, preparing correspondence, and presentations.
- Ability to work in a fast-paced and sometimes unpredictable environment; works well under pressure and tight deadlines.
- Proficiency in MS Office and an aptitude to learn customized software applications.
- Strong interpersonal skills and a collaborative mindset with the ability to work in teams, independently, and with customers.
- A Christian faith commitment and loyalty to the mission of and ministries supported by the United States Conference of Mennonite Brethren Churches. Must be able to affirm the USMB Confession of Faith and have a growing commitment to Biblical stewardship.

APPLICATION

To apply, email your resume to hrdepartment@mbfoundation.com.

Visit www.mbfoundation.com/employment for more information and to review the USMB Confession of Faith.