

## **JOB DESCRIPTION PLANNED GIVING ADVISOR**

### **POSITION SUMMARY**

To represent MBF's programs and services to individuals and ministries throughout an assigned constituency. The Advisor will encourage charitable giving through current giving, estate planning, and lifetime gift plans, as well as provide customer service in all other areas associated with MBF. This position can office out of either Hillsboro, KS, or Fresno, CA.

### **ESSENTIAL FUNCTIONS**

- Provide routine information, in person or otherwise, concerning services or policies.
- Provide customer services in the area of planned giving, institutional fund management, estate planning, and certificates.
- Identify, cultivate and solicit potential donors.
- Create and maintain a pipeline of planned gift prospects.
- Set and report goals for planned gifts and document donor contacts.
- Develop donor proposals and facilitate gift completion.
- Assist with development of planned giving marketing materials and strategy.
- Promote the certificate program.
- Build relationships with partner ministries and support their development efforts.
- Build relationships within our MB churches & constituency and communicate our services.
- Sow faithfully and regularly while growing personally, as a generous steward.
- Keep abreast of current tax laws and gift planning trends/strategies.
- Maintain regular office hours and serve client telephone and walk-in traffic.
- Work with other team members to further the ministry of MB Foundation.
- All other duties deemed necessary.

### **REQUIREMENTS**

- Bachelor's degree or equivalent work experience.
- An eagerness to encourage generosity.
- Strong verbal, written and listening skills.
- Willingness to travel, including some weekends.
- Ability to work independently as a "self-starter" and as a team.
- Ability to develop, implement and evaluate a work plan or strategy.
- Aptitude for detail work and ability to maintain sensitive and confidential information.
- Computer literacy and willingness to learn appropriate software applications.
- Presentation skills (group & individual) with the ability to take a client from concept to closure, and a high desire to offer exceptional customer service.
- Ability to understand and communicate financial and estate planning concepts as they relate to charitable giving, taxes, retirement and Biblical stewardship.
- Willingness to obtain certain training and securities licensure, as required.
- 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](mailto:hrdepartment@mbfoundation.com).

Visit [www.mbfoundation.com/employment](http://www.mbfoundation.com/employment) for more information and to review the USMB Confession of Faith.