



Office of Alumni Relations in the Wray-Nicholson House

DIVISION OF DEVELOPMENT AND ALUMNI RELATIONS

SENIOR DIRECTOR OF GIFT & ESTATE PLANNING

POSITION PROFILE



**UNIVERSITY OF
GEORGIA**

Senior Director of Gift & Estate Planning



The University of Georgia, the flagship research institution of the University System of Georgia, invites applications and nominations for the position of **Senior Director of Gift & Estate Planning**. This is an exceptional opportunity for an experienced and knowledgeable advancement officer to serve a leadership role in gift and estate planning at one of the best public universities in the nation.

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THE OPPORTUNITY

The University of Georgia is the birthplace of public higher education in America. Ranked as one of the nation's top public research universities, UGA has continued to be at the forefront of education and research since its founding in 1785.

The UGA Division of Development and Alumni Relations is responsible for resource development that enables the University to help remove barriers for students, enhance the learning experience and environment, and conduct work and research in seeking to solve the challenges of the world.

The Office of Gift & Estate Planning works collaboratively with all colleges and areas of the University of Georgia to secure planned gift commitments from alumni and friends. Planned gifts

include bequests, gifts of retirement assets and/or life insurance through a beneficiary designation, charitable gift annuities, charitable remainder trusts, and charitable lead trusts.

The office is currently comprised of an Associate Director of Development, Assistant Director of Development, Marketing Coordinator, Trust & Estates Coordinator, and Stewardship Coordinator. Each member of the team is available to assist development staff in identifying, cultivating, soliciting, and stewarding planned giving prospects.

Gift & Estate Planning also partners directly with donors and their professional advisors to create a plan allowing the donor to achieve their philanthropic, financial, and estate planning objectives while supporting the University's mission.

Reporting directly to the Executive Director of Development, the Senior Director of Gift & Estate Planning is expected to advance the mission of the University, the Development and Alumni Relations Division, and the Office of Development. This administrator is charged with securing strong and stable relationships with internal and external constituencies and must operate through effective communication, strategy development, coordination and management of the planned giving program, and the successful leadership of staff.

POSITION RESPONSIBILITIES

- Determine and implement departmental direction concerning all facets of estate and gift planning including, but not limited to, charitable gift annuities, charitable remainder trusts, pooled income funds, and bequests.
- Conduct face-to-face visits with prospective and current donors as needed for cultivation, solicitation, and stewardship purposes, including selected visits with advisors to donors.
- Manage the day-to-day operations of the fundraising programs in Gift & Estate Planning.
- Supervise the five-member staff and initiate any personnel actions required for the unit.
- Serve as a member of the senior leadership team of the Office of Development, helping develop strategies and set policies and procedures.
- Provide oversight of the design and development of proposals, planned gift agreements, and all print and web-based materials for the unit.
- Develop and oversee the annual operating budget for the unit.

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- Serve as the point of contact for all UGA Development staff and other institutions regarding issues and questions involving estate and gift planning.
- Attend Development staff meeting as required and attend and conduct continuing education as requested.

QUALIFICATIONS

Minimum:

- Bachelor's degree and eight years of related higher education experience

Preferred:

- Higher education experience with comprehensive campaign experience

Other qualifications:

- Knowledge of investments, financial markets, real estate, etc.
- Strong interpersonal, verbal and written communication skills
- Strong management, organizational, and time management skills
- Ability to work independently and collaboratively
- Basic office computer and equipment skills
- Ability to travel in and out of state

THE UNIVERSITY OF GEORGIA

Chartered by the Georgia General Assembly on January 27, 1785, the University of Georgia is America's first state-chartered university and the birthplace of the American system of public higher education.

The comprehensive land-and-sea-grant institution receives numerous recognitions each year. *Kiplinger Magazine* ranks UGA 12th in its 2018 list of the "100 Best Values in Public Colleges." *U.S. News & World Report's* 2017 "Best Colleges" edition has UGA ranked 16th among public universities, while *Forbes* lists UGA No. 17 on its list of colleges that dominate both academically and athletically.

UGA attracts some of the most academically talented students in the nation. The 2016 Freshman Class had an average SAT score: 1469 (critical reading and math sections only); average ACT score: 33 (English and math sections only); and GPA: 4.07.

There have been hundreds of major scholarship winners at UGA. Since 1995, the University has had 112 Fulbright Student Scholars, 53 Goldwater Scholars, 24 Rhodes Scholars, 37 Boren Scholars,

7 Gates Cambridge Scholars, 7 Marshall Scholars, 20 Truman Scholars, 16 Udall Scholars, 3 Schwarzman Scholars, and 3 Mitchell Scholars.

Fall 2017 enrollment at UGA totaled 37,606 students, including 28,848 undergraduates and 8,758 graduate and professional students. There are 125 foreign countries represented within the student body. Twenty-six percent of the undergraduate enrollment is minority.

The University is composed of 17 schools and colleges; Agricultural and Environmental Sciences, Arts and Sciences, Business, Ecology, Education, Engineering, Environment and Design, Family and Consumer Sciences, Forestry and Natural Resources, Graduate School, Journalism and Mass Communication, Law, Pharmacy, Public Health, Public and International Affairs, Social Work, and Veterinary Medicine. UGA also is home to the Augusta University and the University of Georgia Medical Partnership.

Beyond its vast academic and research programs, UGA is home to the prestigious Peabody Awards, the Georgia Writers Hall of Fame, the State Botanical Garden, State Museum



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of Art, the State Museum of Natural History, and the Richard B. Russell Building Special Collections Libraries.

UGA has a nationally competitive intercollegiate athletic program. A member of the NCAA Division 1, Southeastern Conference, the Bulldogs have won 42 national championships, including 30 since 1999.

ABOUT ATHENS-CLARKE COUNTY, GEORGIA

The University's main campus is located in Athens-Clarke County, Georgia, located approximately 65 miles northeast of Atlanta. With a population of more than 192,000 residents, the city teems with activity.

Rolling Stones calls Athens the number one college music scene in the U.S. *Forbes* recently listed Athens as one of the 25 best retirement communities in the nation. The National Trust for Historic Preservation describes Athens as one of America's foremost "distinctive destinations" for its dynamic downtown, cultural diversity, attractive architecture, vibrant performing and visual arts scene, and strong commitment to historic preservation and revitalization.

Approximately an hour away is Atlanta, the largest metropolitan city in the Southeast. Considered a top business and transportation hub, Atlanta is a major center for cultural, entertainment and professional athletic activities. Live theatre, opera, ballet, symphonies, concerts, and festivals are among the offerings of the city. Sports fans enjoy a full range of activities from major league baseball, football, basketball and hockey to PGA golf tournaments and the annual Peachtree Road Race.



APPLICATIONS AND NOMINATIONS

Confidential inquiries are welcomed; applications and nominations are invited. Initial screening of applications is underway and will continue until an appointment is made.

The application packet must include:

1. Letter describing relevant experience and interest in the position
2. Resume
3. Three professional references, including full contact and email information (References will not be contacted without the applicant's consent.)

Submit application to UGA-GEP@myersmcrac.com. Applications for this position will be accepted until filled.

Submit nominations to UGA-GEP-Nominate@myersmcrac.com with full contact and email information on the person being nominated.

IMPORTANT NOTE: The UGA Office of Human Resources also requires a completed application packet. The UGA application form is available at www.ugajobsearch.com and the **Posting Number** is **S00217P**. Submission instructions are on the website.

Emily Parker Myers, Chief Executive Officer, and **Jennifer Barfield**, Senior Vice President, of **Myers McRae Executive Search and Consulting**, are assisting the University of Georgia with this search.



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The University of Georgia is an Equal Opportunity/Affirmative Action Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, sexual orientation, gender identity, disability, or protected veteran status.

UGA is committed to diversity. Applications from minority candidates are welcomed.