

THE MARIANIST PROVINCE OF THE UNITED STATES

POSITION DESCRIPTION

TITLE: Legacy Giving Administrative Assistant

FLSA: Hourly

Reports To: Director of Legacy Giving

LOCATION: Marianist Mission, Dayton, OH

GENERAL SUMMARY:

Responsible to provide documentation, research, and support for our Legacy Giving department. Assist in stewarding the Chaminade Society and the Pillar Society. Maintain good communication and rapport with our Legacy Giving donors.

Principal Duties and Responsibilities

Maintain the Wills files from deceased Marianist Mission donors who have included the Marianist Mission in their estate plans. Communicate with lawyers and the administrators/executors of pending estates.

Responsible for keeping the files up to date for our yearly audit on donations from the Wills and our deceased gift annuitants. Eliminate old files of deceased annuitants and out of date Wills correspondence. This is critical for the yearly Legacy Giving reports that are printed in *Alive* magazine, the Marianist Province of the U.S. publication.

Assist the Legacy Giving Director in the process to acquire funds for the Marianist Mission through stock gifts and various Mutual Funds and insurance policies.

Maintain a “watch” on the national obituary to help the Marianist Mission acquire information on any unreported deceased annuitant. This information prevents gift annuity payments being issued after the death of an annuitant.

Create all new gift annuity contracts.

Keep accurate records of the Wills on Excel spreadsheets for Data Entry, so these can be reported to the Marianist Province of the U.S.

On a monthly basis, research online and verify matching gift requests so the Marianist Mission can receive the gift.

Maintain the database on Raisers Edge, Crescendo Pro (Gift Annuity Administration Software) and Constituent Software.

Work with the Director of Legacy Giving to promote new gift annuity contracts from our existing gift annuitants.

Prepare to receive year end stock gifts and for the “Fire Sale” gift annuities that come in during the last quarter of the fiscal year.

Responsible for all correspondence about Estates, Thank You letters, 501(c), corporate resolutions, Will information requests and gift annuity requests.

Maintain current knowledge of Crescendo Pro and other vendor provided material in support of planned giving.

Other duties as needed.

QUALIFICATIONS AND EXPERIENCE:

1. High school diploma or GED certificate
2. Proficient in use of Word and Excel required; Raiser’s Edge software experience preferred.
3. Must be able to maintain confidentiality
4. Proficient in use of the internet for research
5. Must be detail oriented and maintain strong organizational skills
6. Knowledge of the Marianists (Society of Mary) and their ministries helpful.

PHYSICAL DEMANDS: Work is generally in an indoor setting.

ACCOUNTABILITY: Legacy Giving Administrative Assistant is directly accountability to the Director of Legacy Giving.

REASONABLE ACCOMMODATIONS: Lifting up to __10____ pounds is essential for this position. Lifting weights above __10____ pounds may be accommodated by seeking help from another co-worker. Remainder of the physical demands listed above are essential to this position for which no reasonable accommodation can be made.

Job descriptions are not intended, nor should be construed, to be all-inclusive lists of all responsibilities, skills, efforts or working conditions associated with a job. While this job description is intended to be an accurate reflection of the job requirements, management reserves the right to modify, add or remove duties from particular jobs and to assign other duties as necessary.

**For consideration please email resume and cover letter
by December 15 to:
megarcia@sm-usa.org**

*(Note: We reserve the right to shorten the deadline for applications if we have sufficient interest.
Please apply early to ensure your background will be considered.)*