

Planned Giving and Endowment Building Team Member Job Description

The following is a SAMPLE Planned Giving and Endowment Building Team Member job description, which you can customize to fit the needs of your program. Enclose this job description with the team member recruitment letter.

To request a Microsoft Word version of this document that you can customize for your use, please contact the Foundation at info@rcfstl.org.

Our Planned Giving and Endowment Building Program is vitally important to the long-term sustainability of our ministry. As a member of the Planned Giving and Endowment Building Team, you will be instrumental in educating fellow parishioners/donors about our endowment fund and the importance of planned giving in growing our fund.

Qualifications:

- Spiritual commitment to the stewardship mission of our organization, as evidenced by faithful donations of time, talent and treasure to our various activities
- Strong interpersonal and organizational skills; ability to work productively with our staff and volunteers
- Demonstrated leadership skills
- Skills or interest in the areas of stewardship, fundraising/development, sales, marketing, financial planning or estate law

Expectations:

- Commit to making a planned gift to our endowment fund and consider sharing your personal testimonial about your contribution with fellow parishioners/donors
- Attend and participate in all Planned Giving and Endowment Building Team meetings (usually held quarterly)
- Participate in the development and execution of a marketing plan in support of our endowment fund
- Attend and participate in events educating and/or honoring planned giving donors and potential donors
- Assist in the identification, cultivation and solicitation of prospective planned giving donors
- Assist in the identification and recruitment of individuals and/or couples who are willing to share personal testimonials with others about their contributions to—or engagement with—our endowment fund
- Assist in identifying, recruiting and orienting new Planned Giving and Endowment Building Team members