



VOLUNTEERS - Job Description

1. Planned Giving Provincial Advisory Committee

Committee Composition

The [Organization's Name] Planned Giving Advisory committee is comprised of individuals from professions such as will and estate lawyers, estate planners, financial advisors, tax accountants, life insurance agents and investment brokers. The committee structure should **include a board member** and at least two committee members with expertise that falls into the above-mentioned fields of expertise.

Committee Terms of Reference

- Provide technical expertise. Advice must also be sought from paid legal and accounting professionals as needed.
- Make periodic planned giving status reports to the Board of Directors.
- Review and update planned giving policies and procedures as required.
- Provide oversight and guidance to the program, providing an independent and objective perspective.
- Provide innovative ideas to market the planned giving program, and to recognize loyal and long-term donors.
- Provide practical support to the program by assisting in planning and budgeting, acknowledging gifts and intended planned gifts, planning, writing newsletter articles, promoting and conducting seminars (where expertise is applicable).
- Review publications and other marketing materials promoting planned gifts, major gifts, endowments and recognition programs and send copies of articles to the provincial office to allow [Organization's Name] to build a reference library of relevant materials.
- Review any proposed planned gifts such as real estate, tangible property and residual interests, making recommendations as to whether they are in the best interest of [Organization's Name].
- Assist with prospect identification and analysis.
- Assist staff on donor visits.

**VOLUNTEERS - Job Description****2. Planned Giving Committees**Chair Job Description

The Chair of the Planned Giving Committee has the task of serving to heighten awareness in the community of the benefits of planned giving and the impact gifts would have on the programs and activities of [Organization's Name]. As a representative speaking to individuals who wish to find out how to make a planned gift or major gift, the incumbent requires special interpersonal skills and technical know-how in at least one of: financial and investment planning, estate planning, law, trust, personal insurance or tax accounting.

Leadership/Teamwork/Networking

1. Recruit, train and chair an active Planned Giving Committee.
2. Liaise with will & estate lawyers, estate planners, trust officers, tax accountants, financial planners and any other Allied Professionals within the community area, providing them with [Organization's Name] planned giving materials and assisting them in any other way deemed appropriate.

Opportunity Spotting

1. Build relationships with potential supporters.
2. Notify the provincial office of planned giving or major gift requests, donor interests, why they support [Organization's Name], which programmes so the information can be added to the planned giving database.

**VOLUNTEERS - Job Description****3. Member**Job Description

The responsibilities of Planned Giving Committee may vary depending upon the Allied Professionals and the quantity of inquiries generated. However, the committee should:

1. Assist the Planned Giving Chair in fulfilling responsibilities particularly in the following areas:

- Researching and forwarding planned giving potential donor and Allied Professional data list to the provincial office for input into the database.
- Calling potential donors and Allied Professionals to build relationships.
- Delivering Planned Giving materials to potential donors and Allied Professionals as needed.
- As well as all other duties as outlined in the Terms of Reference.

Membership

Members should have adequate time available on a regular basis and have good interpersonal skills. Tact and sensitivity are required when dealing with potential donors and their families or busy Allied Professionals.

It is helpful to have an area lawyer, financial planner, life insurance agent, and tax accountant or trust company account manager on the committee. A marketing and communications person is a very valuable asset to committees.

**VOLUNTEERS - Job Description****4. Planned Giving Committee Tasks**Volunteer Planned Giving Projects

- Develop a local Allied Professional mailing list.
 - corporate name, individual contact and address list for allied professionals in your community i.e.: will & estate lawyers, estate planners, tax specialists, financial advisors, personal life agents.
- Develop a Planned Giving/Major Gift mailing list of prospects.
- Provide (Insert Your Organization's Name HERE) planned giving materials to local allied professionals and prospective planned giving donors.
- Assist in referral introductions (where appropriate) of those interested in making a planned gift.
- Provide recognition and "thank you's" to donors who have notified (Insert Your Organization's Name HERE) of their planned gifts.
- Invite prospective planned giving donors to (Insert Your Organization's Name HERE) events.
- Attend (Insert Your Organization's Name HERE) events and meet and mingle with prospect donors thereby building relationships.