



Director, Planned Giving

Reports to: Senior Director of Development

Supervisory Responsibility: None

Position Classification: Full Time, Exempt

Position Description: This role will build a long-term philanthropic pipeline by engaging donors in legacy giving, deepening relationships, and creating pathways for transformational gifts. The Director will serve as both a strategist and frontline fundraiser, working closely with leadership, board members, and professional advisors to secure future resources that ensure the organization's continued growth and impact.

Position Skills & Qualifications:

- 5–8+ years of fundraising experience, with demonstrated success in planned giving or major gifts
- Proven ability to build and grow a program from strategy through execution
- Strong knowledge of planned giving vehicles and donor motivations
- Experience working with professional advisors and high-net-worth individuals
- Exceptional relationship-building, communication, and storytelling skills
- Strategic thinker with the ability to execute tactically
- CFRE or advanced planned giving certification preferred
- Mission-driven

Duties & Responsibilities:

Strategy & Program Development

- Design and implement a **comprehensive planned giving strategy** aligned with MOWT's growth goals and expansion priorities.
- Develop and execute an **annual planned giving work plan**, including measurable goals for donor identification, cultivation, solicitation, and stewardship.
- Establish giving vehicles including:
 - Bequests
 - Charitable gift annuities
 - Trusts and beneficiary designations
- Create a **multi-year pipeline strategy** to grow legacy commitments and future revenue.

Donor Engagement & Relationship Management

- Identify, qualify, and manage a portfolio of planned giving prospects and donors.
- Partner with major gifts and annual fund teams to **integrate planned giving into all donor conversations**.
- Lead **personalized cultivation strategies** for high-capacity donors and long-time supporters.
- Develop compelling messaging that connects legacy giving to mission impact, particularly the long-term sustainability of serving vulnerable seniors.



Professional Advisor & Community Networking

- Build and maintain strong relationships with:
 - Estate planning attorneys
 - Financial advisors
 - Wealth managers
 - Accountants
- Actively participate in and represent MOWT within local organizations such as:
 - Planned Giving Councils
 - Estate Planning Councils
 - Financial planning associations
- Position MOWT as a **trusted philanthropic partner** within the professional advisor community.

Advisory Group & Committee Development

- Establish and lead a **Planned Giving Advisory Council** composed of professional advisors and key community leaders.
- Partner with the Board to create and support a **Planned Giving Committee** to:
 - Expand networks
 - Open doors to prospects
 - Champion legacy giving initiatives
- Provide training and tools to board and volunteers to support planned giving conversations.

Marketing & Communications

- Develop and execute a **planned giving marketing strategy**, including:
 - Legacy society branding and recognition
 - Website and digital presence
 - Print and donor communications
- Write donor-facing materials that clearly explain giving options and impact, working with marketing and branding to create collateral pieces.
- Integrate planned giving messaging into campaigns, events, and stewardship efforts.

Stewardship & Recognition

- Launch and manage a **Legacy Society** to recognize and steward planned giving donors.
- Design meaningful engagement opportunities that reinforce donors' long-term impact.
- Ensure consistent, high-touch stewardship aligned with MOWT's culture of gratitude.

Internal Leadership & Collaboration

- Collaborate with CEO and Development leadership to align planned giving with overall fundraising strategy.
- Train staff and board on **planned giving basics and opportunity identification**.
- Partner with finance and legal advisors to ensure compliance and proper gift acceptance.
- Staff liaison to Planned Giving Committee.
- Supports Board Development Committee on legacy giving strategy.
- Be an active and enthusiastic participant in the Meals On Wheels of Tampa team.
- Other duties as required by CEO.