

ASSOCIATE DIRECTOR OF TRUSTS & ESTATES

Regular, full-time, 12-month position
Salary: dependent upon qualifications

Pomona College seeks an Associate Director, Trusts and Estates (T&E). The Associate Director will function as a frontline development officer with responsibility for negotiating life-income agreements (*Pomona Plan* agreements) and assisting donors with bequest plans. As part of this responsibility, write proposals for life-income gifts; visit life-income donors and prospects; prepare, with Assistant Director, documents for life-income agreements; and assist as necessary with receipt of assets. Cultivate bequests by responding to requests for structuring estate plans and visiting bequest prospects. Respond to inquiries concerning gifts in kind and gifts of real property, both outright and deferred. Participate in consulting with other development officers in the Advancement division on gift planning opportunities that may combine outright and deferred giving. Negotiate gifts of tangible personal property, both outright and deferred. The Associate Director will also lead efforts within T&E to steward life-income donors and agreements, including planning selected events, encouraging membership in the *Allen F. Hawley Society* and *Granite and Sagebrush, the Bequest Society of Pomona College*, managing database information, and reporting to trust beneficiaries. Coordinate with Trust Administrator in the Business Office to ensure compliance with fiduciary duty to report to trust beneficiaries; oversee gift substantiation; ensure that all reporting conforms to current tax codes. Develop reports from database information. Serve as member of AISG, the Advancement database planning group. The Associate Director will also develop and supervise the office budget; monitor expenditures throughout fiscal year. From time to time, assist Senior Director in preparing reports to the Investment Committee and Finance Committee of the Board of Trustees. As time permits, participate with the Senior Director in investment management of trusts. The Associate Director will report to the Senior Director, Trusts and Estates.

Education/Experience: J.D. preferred. At least five years' professional work experience required. Fundraising experience preferred. Experience in database management required. Must be proficient with Microsoft Office XP and have a working knowledge and understanding of databases. Further information available at www.pomonaplan.pomona.edu Please download Application for Employment from www.pomona.edu and return with resume and writing sample to Trusts & Estates Office, C/O Human Resources, 550 N. College Ave., Claremont CA 91711. Position will be open until filled. Candidate will need to successfully complete a background check and possess a valid driver's license.