



# West Point

ASSOCIATION OF GRADUATES

## **Director of Planned Giving**

The West Point Association of Graduates is dedicated to furthering the ideals and promoting the welfare of the United States Military Academy, and to supporting and serving its graduates. USMA is renowned as the world's preeminent leader development institution. The student body, or Corps of Cadets, numbers 4,400 and each year approximately 1,000 cadets graduate and are commissioned as second lieutenants in the U.S. Army.

The West Point Association of Graduates (WPAOG) is seeking a Director for Planned Giving. Director reports to the Vice President of Development and is a member of the Department's Senior Staff, the Director oversees the successful execution of department's planned giving program to: (1) realize increased levels of new planned gift commitments, (2) ensure accurate administration and ultimate receipt of matured estate gifts, (3) provide meaningful stewardship for existing donors, and (4) ensure legal compliance with federal tax laws and regulations and planned giving best practices.

Position requires comprehensive knowledge of fundraising practices, tax and estate planning principles, and planned gift vehicles (will bequests, living trusts, retirement plan assets, life insurance, and life income plans - charitable remainder and lead trusts, pooled income funds and charitable gift annuities.) The Director manages an expanding gift annuity program encompassing 25 states. Overseeing a staff of three, the Director manages a comprehensive marketing program for prospect identification and cultivation. The Director coordinates with the CFO and Finance Office on a regular basis.

The incumbent must be able to utilize the database to identify and qualify new potential donors. S/he must respond to donor-initiated questions, contact and assist donors in identifying options for their philanthropic goals and monitor recognition and stewardship. Incumbent should have excellent writing, research and presentation skills and demonstrate intermediate level experience using Microsoft Office software, including Word, Excel and PowerPoint. Excellent interpersonal skills, with the ability to establish and maintain relationships at all organizational levels is desired. A bachelor's degree is required and an advanced degree is preferred. Prior planned giving fundraising experience or a background in legal or financial estate planning and knowledge and experience with CRM is also preferred. Familiarity with the United States Military Academy or the military is desired.

We offer excellent benefits and a pleasant working environment. Salary commensurate with skills and experience. Please submit cover letter, resume and letters of reference. To apply please go to [www.westpointaog.org](http://www.westpointaog.org) then click on "Employment" on the bottom left-hand side of the page.

West Point Association of Graduates is an Equal Opportunity Employer

View our website at: [www.westpointaog.org](http://www.westpointaog.org)

*Serving West Point and the Long Gray Line*