



## Zoo Jobs: Search for Jobs

### Job Title: SR PLANNED GIVING OFFICER-ZOO

Location:	San Diego Zoo	Job Code:	182073
Shift:	Days	Category:	Fundraising
Average Hours per Week:	40	Employment Status:	With Benefits

### JOB DESCRIPTION:

**\*\*This Employer Participates in E-Verify\*\***  
**\*\*The San Diego Zoo Global is a non smoking work place\*\***

**Deadline to apply: Sunday, 01/22/2012 by 9:30 p.m. Pacific Standard Time.**

**(Exempt Position) Salary is commensurate with experience. With benefits.**

*"Put Your Passion For Wildlife To Work"*

### JOB REQUIREMENTS:

#### PRIMARY PURPOSE

The Senior Planned Giving Officer (SPGO) performs all job assignments with a positive attitude that reflects San Diego Zoo Global's mission and vision of connecting people to wildlife, conservation and pursues green/conservation practices when feasible. The SPGO is responsible for managing and implementing various planned gifts, donor prospect cultivation and solicitation, comprehensive planned giving program to secure financial resources to meet the San Diego Zoo Global's immediate and long-term priorities. The SPGO reports to the Planned Giving Manager.

#### ESSENTIAL FUNCTIONS

- Initiates and participates in identification, involvement, cultivation, solicitation and stewardship of donor prospects
- Provides estate and financial planning in the area of counseling donors
- Collaborate with donor's attorneys as needed to document gift arrangements
- Coordinates donor/prospect visits and tours with other departments as needed
- Serve as a member of the Individual and Planned Giving team
- Project revenues and expenses
- Participates in the planning, writing and production of publications
- Participates in staff meetings
- Assures compliance with IRS regulations and related laws
- Provides complex interpretation regarding fund raising
- Adheres to the organization's policies and practices
- Exemplifies the highest standard of work ethics
- Practices the GRRREAT Customer Service Standards

#### REPRESENTATIVE DUTIES

- Manages cultivation, solicitation, and stewardship for assigned portfolio of potential donors and Heritage Guild members
- Increases the number of inquiries from individuals and their advisors that lead to planned and outright gifts to the SDZ GLOBAL
- Communicates estate gift opportunities, methods, and tax aspects to potential donors and advisors
- Develop relationships and maintains contact with donors, prospects, staff, board members, committees, and volunteers in order to produce estate and investment plan donations

- Plans, organizes and oversees implementation of recruitment, coordinates cultivation and recognition activities as needed
- Provides information regarding Society funding priorities
- Organize and conduct on-site tours for donors/prospects
- Establish donor recognition opportunities

**ANCILLARY FUNCTIONS**

Performs related duties and responsibilities as required.

**QUALIFICATIONS**

Examples of representative qualifications include a Bachelor's degree in business administration, finance, or a related field; an example of experience would be four or more years experience in fund raising, preferably gift planning; valid California driver license.

Knowledge of:

- Estate planning methods and specific planned giving techniques.
- Tax aspects of gift plans.
- The financial/investment market.
- Probate, trust, and tax laws and probate and trust administration

Ability to:

- Use word processing
- Analyze and utilize database
- Supervise staff and volunteers
- Work with teams and effectively with others
- Communicate effectively (verbal and written)

**WORKING ENVIRONMENT**

Office environment.

**PHYSICAL DEMANDS**

Ability to travel is desirable.

ALL EMPLOYMENT IS CONTINGENT UPON PASSING A DRUG SCREEN.  
SOME EMPLOYMENT IS CONTINGENT UPON PASSING PRE-PLACEMENT TESTING.