

# SOUTHERN UNION CONFERENCE

## Job Description



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|--------------------|---|-------------------------------|--|
| <b>Job Title:</b>  | <b>Planned Giving &amp; Trust Services Director</b> | <b>Type Of Position:</b>      | <b>Hours Per Week</b> <u>Up to 19*</u> |
| <b>Location:</b>   | 302 Research Dr., Norcross, GA 30092                | <b>Full Time</b> _____        |  |
| <b>Department:</b> | Planned Giving & Trust Services                     | <b>Part Time</b> <u>  X  </u> | <b>Exempt</b> <u>  X  </u>             |
| <b>Reports To:</b> | President   | <b>Intern</b> _____           | <b>Nonexempt</b> _____                 |

### POSITION SUMMARY:

To give overall coordination and supervise the activities of Planned Giving and Trust Services for the Southern Union territory. Serve as trustee for the irrevocable trusts and other documents. To communicate and cooperate with the North American Division Planned Giving and Trust Services Department.

### SCOPE OF RESPONSIBILITY:

- Supervise and oversee the operations of the department.
- Respond to telephone calls, emails, and correspondence.
- Communicate and visit donors/trustors in cooperation with Western Adventist Foundation and conferences within the Southern Union.
- Plan and execute the Southern Union Departmental meeting and other training meetings as required.
- Attend SURF and Association board, staff meetings, various committees and conferences.
- Respond to request for assistance from the Southern Union Conferences and university.
- Serve as liaison to Western Adventist Foundation (WAF). Attend board meetings and gather information beneficial to the Southern Union Conference as necessary.
- Ensure department is operating within annual budget.
- Other responsibilities as may be assigned by Southern Union Treasurer or President.

### RECOMMENDED EDUCATION/EXPERIENCE:

- Bachelor's degree. Graduate degree in Business, Law or Theology is desired.
- Minimum of five years in Planned Giving and Trust Services; Wills & Bequests, large Charitable Irrevocable Trusts, Gift Annuities and other forms of Charitable Giving.
- NAD Planned Giving & Trust Services Certification.

### KNOWLEDGE AND SKILL:

Knowledge of principles, policies, and beliefs of the Southern Union Conference and Seventh-day Adventist Church. Knowledge of church structure and organization, including committee procedures, etc. Knowledge and skills in appropriate methods of dealing with human behavior in various circumstances. Advanced command of language skills, including proficiency in verbal and written form.

Ability in strategic planning, leadership and organization. Ability to develop long-and short-term plans and programs; and to establish and maintain effective relationships with internal/external personnel. Must possess advanced ability to effectively present facts and recommendations in oral and written form.

**CONTACTS, ORGANIZATIONAL RELATIONSHIPS:**

Contact with church leaders, outside organizations, and lay persons, as well as Southern Union personnel at all levels. Must possess advanced interpersonal skills and project a professional Christian image.

**PHYSICAL REQUIREMENTS:**

Must be able to read, speak, and hear in the English language. Must be able to effectively communicate both orally and in writing. Some standing, walking, bending, kneeling, carrying of light items, etc. required. Must be able to travel extensively in all parts of the Southern Union territory under varying conditions.

**WORKING CONDITIONS:**

Essential responsibilities are performed in sedentary and comfortable manner. Tasks are usually performed under normal office conditions with little or no noticeable discomfort. Work area is well-lighted and ventilated. Conditions may be difficult on itinerary with some irregularity in hours

\*There may be weeks where 19 hours will be exceeded. However, it is understood that over the course of a year's employment the average should not exceed 19 hours per week. It is also understood that after year one of employment, the expected number of hours per week will drop to 13 (1/3 time).