

Gifts in Wills Specialist

As the Gifts in Wills Specialist, it's my role to drive the development and growth of the Bequest Program by engaging current and prospective Bequest Supporters, their families and estate executors to increase the value of Bequest income to Caritas Australia.

I am a member of:

Fundraising team

I report to:

Manager, Philanthropy

My role is based in:

Alexandria, Sydney

My role is classified:

SCHADS Level 4

I am committed to:

- the mission of Caritas Australia in our quest to end poverty and injustice through the realisation of human dignity for all people
- the principles of Catholic Social Teaching which underpin our work, such as dignity of the human person and the common good
- our Code of Conduct which outlines the professional behaviour that is expected of me
- the safeguarding of children and vulnerable adults in line with laws, standards and Caritas Australia's policies and procedures

In my role, I am accountable for:

- Supporting the Manager, Philanthropy to develop and implement a comprehensive Gifts in Wills strategy which will achieve annual individual and team objectives.
- Proactively engaging with current and potential Bequest Donors through face to face meetings, phone and email to establish and strengthen long term relationships.
- In collaboration with the Manager, Philanthropy, preparing and rolling out strategic engagement plans and contact management database in profiling, acquisition, cultivation and solicitation of bequest prospects and the stewardship of confirmed bequests to Caritas Australia.
- Developing a stewardship recognition program thanking Supporters/Donors for their gifts and retaining Supporter engagement once a bequest is made.
- Acting as the first point of contact for bequest enquiries, conducting personal visits, calls, letters and other activities such as producing persuasive materials, developing direct mail campaigns with a focus on converting Supporters from inquiring to confirmed gifts.
- Stewardship of established relationships with bequest donors and using existing data leads to source new income.
- Liaising with estate executors to manage significant bequest and gift prospects.
- Assisting with the development and roll out of key stakeholder engagement events and campaigns.
- Reporting on pipeline growth activities and engagement.
- Develop an In Lieu donation growth strategy with accompanying collateral and marketing in collaboration with the Manager, Philanthropy.



For this role I need these skills and experience:

- Experience in fundraising, marketing, or a service role. An understanding of bequest processes is preferable.
- High ethical standards in dealing with sensitive financial and confidential matters
- Proficiency with Donor/customer databases (Salesforce preferred) and Microsoft Office with demonstrated attention to detail applicable to documentation, record-keeping and planning.
- Proven track record in implementing a marketing or bequest program with experience in working effectively with donors, senior staff and volunteers.
- Demonstrated ability to communicate sensitively to people of all ages, financial and social backgrounds in a variety of settings; ability to write compelling and persuasive written material of the highest quality and accuracy.

In my role, I will interact primarily with:

- Manager – to keep informed on work in progress, receive guidance and to escalate issues as required
- Philanthropy Team and Bequest Officer – to ensure an integrated approach.
- Fundraising group – to integrate and leverage other Fundraising activities as appropriate.
- Community Engagement team – to encourage Diocesan Directors to promote bequests in their parishes.
- Data & Insights Analyst – to identify external research sources and establish compliance and reporting
- Bequest Benefactors – to build a strong relationship and maintain a connection to Caritas for each donor.
- Solicitors – to build a strong relationship and maintain a connection to Caritas for those advising donors who are considering leaving a gift to Caritas.
- Executors – to build a strong relationship and maintain a connection to Caritas for the executors of estates which have left a gift to Caritas.

For this role I am required to have:

1. Working with Children Check (if applicable)
2. Police check
3. Counter terrorism clearance