

Position: Head, Legacy Giving
Reports to: Director, Philanthropy Operations
Position Term: Full Time Permanent
Primary Location: Mississauga, Ontario, Canada
Workplace Type: Hybrid

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Job Purpose:

The Head, Legacy Giving works in tandem and acts as a resource with philanthropy advisors and others within World Vision Canada (WVC) including the Board, Finance and Legal.

This senior role is responsible for engaging and motivating Professional Services Associations, Professional Services practitioners, and other Not-for-profits (such as Hospitals), with the objective of increasing both profile and market share/revenue opportunities through referrals of planned giving offerings to WVC.

Responsible for championing internally and externally growing and diversifying WVC's planned giving offerings and growing these to help fund our mission to help girls and boys living in poverty and suffering from injustices in some of the most dangerous places in the world.

The incumbent will also lead the integration of the WVC legacy strategy across the full organization and bring best legacy-related approaches to grow legacy revenue.

Responsibilities:

- Engages, recruits, and establishes key personal and marketing relationships with national associations and influencers from the professional services sectors including but not limited to accountants, lawyers, estate and financial planners, etc. for the purpose of growing planned giving revenue and increased visibility nationally to enhance future gift commitments.
- Expands the mandate and awareness of planned giving offering acceptance at WVC to current and prospective donors including, but not limited to financial products, endowments, life insurance, gift annuities, gifts of securities, etc.
- Builds a program that puts planned giving within the responsibility of all face-to-face advisors, including training and recommended targets/approaches.
- Advises and makes proactive recommendations to WVC Board, CEO and leadership, regarding best practices on endowments, collaborating with Finance, Legal and/or Investment sub-committees, as needed and on an ad hoc basis.
- Assists select HNW donors and their professional advisors in establishing philanthropic vision, goals and plans with research and presentations with planned giving proposals.
- Remains current on changes in income, estate, and gift tax related rules, regulations, and trends.

- Equips WVC teams to apply knowledge of Canada Revenue Agency (CRA) and compliance requirements for financial products into planned giving outreach.
- Develops and reports on key metrics, indicators and predictive models to direct internal stakeholders on how to maximize ROI and make corrective in-progress recommendations on plans – if needed due to metrics underperforming.
- Transitions prospective donors referred from Professional Advisors into the appropriate WVC Advisor portfolio- enabling the fluidity of donors to be supported with the appropriate closing and stewardship programs.
- Liaises with Advisors and Professionals Services on key donor files regarding having difficult end of life stage conversations via telephone and in person, providing the right balance of information and compassion, while adhering to legal regulations.
- Represents WVC proactively through attending and speaking as a SME at events, leveraging social networks, and identifying influencers, working in alignment with the Director Philanthropy Engagement
- Actively works across WVC organization to create awareness of planned giving opportunities in the community and at events (such as the AFP, CAGP), webinars, etc. that other WVC market can activate
- Provides oversight and works with Legal and/or Finance to ensure timely and accurate processing of gifts, tax receipts, and reporting (where required).

Qualifications:

- University degree in a relevant field (finance, accounting, legal).
- Minimum 10 years of business development, financial sales or fundraising experience.
- Minimum of 5 years leading and managing teams with track record of strengthening staff capabilities
- CFRE, CAGP, CMA, CPA, CFP, LLB, MBA multiple certifications or designations, an asset.
- Experience in fundraising, sales or business development activity that yielded strong financial results
- Demonstrated experience with multi-stakeholder relationships and complex systems.
- Expert verbal communicator and proficient in persuasive conversations and with strong experience in public speaking.
- Excellent written communicator with experience publishing thought leadership content.
- High emotional and spiritual intelligence with strong collaboration skills in a complex context.
- Has an appetite to continually learn and develop skills.

Why Consider Us?

- World Vision Canada has consistently been awarded Canada and GTA top employer awards.
- We are Canada's largest development, relief, and advocacy non-profit organization.
- We embody an Agile mindset here.
- We offer competitive pay and benefits. Our comprehensive health benefits start at day 1 which includes a Health Spending Account.
- We match pension contributions up to 6% and provide a top-up for pregnancy & parental leaves.
- We offer extra time off for restoration by closing for an additional day on long weekends, 6 times a year.
- We provide up to six weeks' vacation, plus paid sick days, personal days & wellness days.
- We offer a family-friendly, caring, and flexible work environment.

Interested in joining us? [Click here to apply.](#)