



Associate Vice President, Estates and Gift Planning

700 University Ave, Toronto, ON M5G 1X6, Canada

Full-time

Department: Princess Margaret Foundation

Company Description

Cancer affects everyone. It remains the leading cause of death in Canada and the second worldwide, with cases expected to double in the next 20 years. Accelerating cancer research and care is our top priority.

At The Princess Margaret, our bold vision is to Conquer Cancer In Our Lifetime.

As one of the world's top five cancer research centers, Princess Margaret Cancer Centre is renowned for groundbreaking scientific discoveries and exceptional patient care. The Foundation's role is to support, enable, and accelerate this vital work.

Signs of a brighter future are evident. Our dedicated community, combined with the excellence, determination, and creative thinking of the Princess Margaret Cancer Centre team, is driving a movement against cancer. Together, we can make a profound impact, prolonging lives and giving people more time with their loved ones.

With the generous support of our passionate community, The Princess Margaret Cancer Foundation (PMCF) is transforming the cancer experience, offering real hope to patients in Canada and around the world. In the past fiscal year, PMCF raised \$284 million, our highest revenue ever, and granted \$144.9 million to the Princess Margaret Cancer Centre. These crucial funds are propelling world-class cancer research and setting new standards of care.

Through the power of our movement, we will achieve our vision to Conquer Cancer In Our Lifetime. Every donation made today accelerates cancer research, improving and prolonging lives tomorrow.

Job Description

Union: Non-Union

Site: 700 University Avenue

Department: Major and Estate Giving

Reports to: Vice President, Major & Transformational Gifts

Hours: 35 hours

Salary: \$160,000 - \$220,000

Status: Permanent, Full Time

Posted Date: June 20, 2024

Closing Date: July 18, 2024

About The Role:

ABOUT THE ROLE.

Established in 1982, PMCF has been setting daring and audacious goals with a mindset that is driven by our culture and passion for the cause. We have pioneered many successful fundraising programs, including our world-leading Princess Margaret Home Lottery, and some of the world's largest peer-to-peer cancer fundraising events, and have sophisticated Estates & Gift Planning and Major & Transformational Gifts programs.

Now, we are seeking an experienced, ambitious and forward-thinking professional to lead and grow the Estates & Gift Planning program at PMCF as we prepare to launch a historic, comprehensive fundraising campaign for The Princess Margaret. Reporting to the Vice President, Major & Transformational Gifts, the Associate Vice President, Estates & Gift Planning (the AVP) will provide leadership to a talented team of four estate giving professionals, including fundraisers and estate giving administrators, and serve as a designated lead, internal champion and resource for estates and other planned gifts across PMCF.

The AVP will be responsible for managing and growing a portfolio of approximately \$8 million in annual estate revenue, and for driving a significant acceleration of confirmed bequest intentions. The AVP will spearhead cultivation, solicitation and marketing strategies to confirm new bequest intentions, and will ensure timely and accurate fiduciary administration of realized estates.

With superb relationship management skills and a deep commitment to stewardship, the AVP will strengthen relationships with estate giving donors and prospects, as well as with a network of professional advisors, including lawyers, financial advisors and trust officers. In addition, the AVP will collaborate closely with Cancer Centre leadership, clinicians, senior volunteers, PMCF Board members, and other PMCF staff in achieving their mandate. They will also be an effective coach and resource for colleagues, helping Major Gifts staff devise, impart and execute gift planning strategies that will inspire both present and future giving.

Key Duties and Responsibilities:

The Associate Vice President, Estates & Gift Planning will focus their time, attention, and efforts in the following areas:

- Work at the strategic level with the Vice President, Major & Transformational Gifts and other members of the Senior Leadership Team to develop a comprehensive estate and gift planning strategy for both realizations and new expectancies
- Personally manage a portfolio of prospects with gift interests ranging from bequests and insurance to trusts, annuities and complex deferred giving structures, on their deferred/planned gifts and in-life giving
- Set PMCF's strategy and oversee execution of PMCF-wide efforts to identify, cultivate and solicit new planned giving prospects, working with all business units as appropriate to secure new gifts
- Provide expertise and advice, as needed, to senior fundraising staff related to complex lifetime gifts such as gifts of private shares, securities, options, gifts from holding companies and combined current and estate gifts
- Collaborate with the Business Intelligence team to monitor the Estates & Gift Planning business and develop predictive algorithms that help guide business planning as well as solicitation and stewardship activities
- Collaborate with the Marketing team on all materials development to support the Estates & Gift Planning program
- Collaborate with the Stewardship and Donor Experience team to devise and implement a stewardship strategy for donors who have committed a planned gift
- Provide staff leadership to a diverse group of professional advisors including lawyers, accountants, insurance advisors and financial planners, engaging them in PMCF's mission and in providing advocacy,

- advice and guidance in support of the Estates & Gift Planning program
- Keep current on applicable laws and regulations related to gift planning and advise PMCF leadership and senior fundraisers on issues related to those regulations as needed
 - Ensure all required estate administration oversight is applied to the highest ethical and legal standards, including review and passing of accounts; application of appropriate trustee compensation; and honouring the terms of wills
 - Resolve any complicated or unusual provisions in estates under administration in a timely manner. Engage senior leadership of PMCF and/or external legal counsel as appropriate.
 - When required, represent PMCF in mediation meetings to ensure that the wishes of the deceased are followed and at the same time protect the interests of PMCF
 - Ensure that estate funds received are properly recorded as designated or undesignated funds and/or invested as endowment funds
 - Oversee acceptance of all in-life structured gifts, such as insurance policies, gifts of residual interest and trusts.
 - Prepare and oversee an annual financial budget plan for the gift and estate planning program, including projected cash revenues and expenses
 - Manage Gift and Estate Planning team members, including recruitment and retention, performance management, professional development and establishing and achieving fundraising goals
 - Engage with the Canadian Association of Gift Planners (CAGP) and related organizations to build and maintain PMCF's network of advisors and gift planners

Qualifications

Below is an outline of the qualifications we believe are important for a candidate to bring to the position or for the successful candidate to develop while in the role:

- A minimum of 10 years of experience in progressive leadership roles in fundraising and/or Estates & Gift Planning
- Experience working in complex healthcare and/or academic environments is preferred
- Experience leading a team in the Estates & Gift Planning function is preferred
- A bachelor's degree or higher, or an equivalent combination of education and professional experience
- Comprehensive knowledge of tax and other legislation related to estates and gift planning
- Proficiency in gift planning strategies and vehicles
- Strong understanding of the Canadian philanthropic landscape
- Excellent relationship management skills, including agility in navigating complex dynamics with donors, their families, and professional advisors
- Effective collaboration and negotiation skills when working with lawyers, estate trustees, and professional advisors
- Experience conceiving, developing and implementing successful strategies for marketing estate and gift planning opportunities to various audiences
- Experience engaging professional advisors in the mission of
- Ability to work collaboratively with senior leaders, clinicians, researchers, and other colleagues
- Strong alignment with the values of Collaboration, Accountability, Respect, and Excellence
- Demonstrated commitment to the principles of Inclusion, Diversity, Equity, Accessibility, and Anti-Racism (IDEAA)

Additional Information

We believe that the way we work together is just as important as what we accomplish. By making choices and taking actions that align with our values, we achieve greater success, and our work lives become happier and more meaningful.

At PMCF, we strive to foster a culture built on Collaboration, Accountability, Respect, and Excellence (CARE). Central to these values is our commitment to IDEAA: Inclusion, Diversity, Equity, Accessibility, and Anti-Racism.

- Experience a sense of purpose that you won't get anywhere else, in any other job. You will be making a difference for millions of people impacted by cancer
- We offer a competitive compensation package including competitive salary, incentive pay, health benefits, and Health of Ontario Pension Plan
- We have an open and approachable culture that enables you to bring your best ideas forward
- We will invest in your growth through ongoing learning opportunities, individual development planning, and education assistance programs
- We offer a hybrid work environment with Tuesday, Thursday and one other day per week in office, or as required subject to business needs

Vaccines (COVID-19 and others) are a requirement of the job unless you have an exemption on a medical ground pursuant to the Ontario Human Rights Code.

For current UHN employees, only those who have successfully completed their probationary period, have a good employee record along with satisfactory attendance in accordance with UHN's attendance management program, and possess all the required experience and qualifications should apply.

University Health Network thanks all applicants, however, only those selected for an interview will be contacted.

UHN is a respectful, caring, and inclusive workplace. We are committed to championing accessibility, diversity and equal opportunity and welcomes all applicants including but not limited to: all religions and ethnicities, LGBTQ2s+, BIPOC, persons with disabilities and all others who may contribute to the further diversification of ideas. Requests for accommodation can be made at any stage of the recruitment process providing the applicant has met the Bona-fide requirements for the open position. Applicants need to make their requirements known when contacted.

All applications must be submitted before the posting close date.

UHN uses email to communicate with selected candidates. Please ensure you check your email regularly.

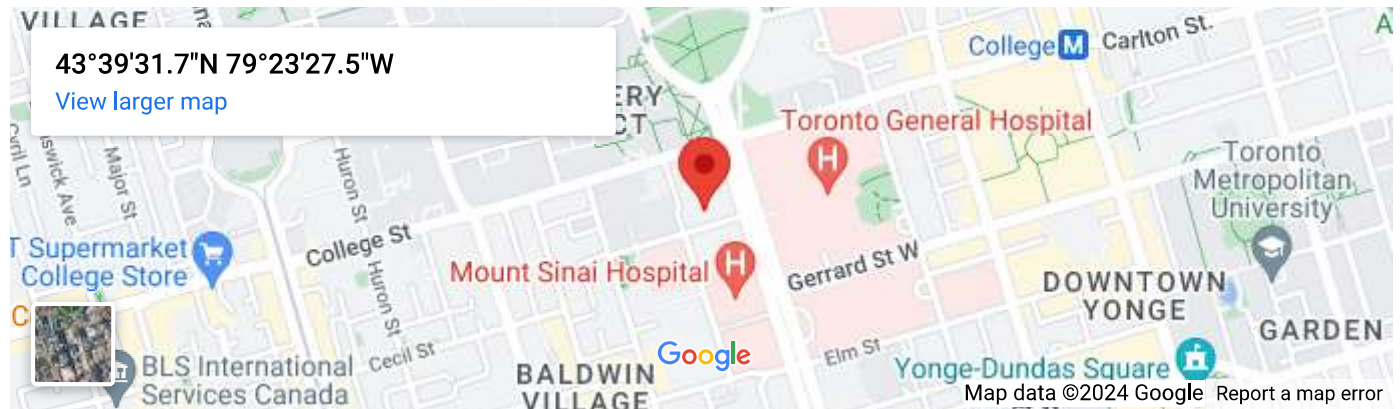
Please be advised that a Criminal Record Check may be required of the successful candidate. Should it be determined that any information provided by a candidate be misleading, inaccurate or incorrect, UHN reserves the right to discontinue with the consideration of their application.

All UHN Employees are required to be fully vaccinated with a COVID-19 vaccine series, approved by Health Canada or the World Health Organization, as a condition of hire. Proof of COVID-19 vaccination will be required. Should you be the successful candidate, you will be required to comply with UHN's mandatory Vaccination Policy that is in effect.

UHN is an equal opportunity employer committed to an inclusive recruitment process and workplace. Requests for accommodation can be made at any stage of the recruitment process. Applicants need to make their requirements known.

We thank all applicants for their interest, however, only those selected for further consideration will be contacted.

Job Location



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