

Manager, Legacy Giving and Stewardship

**Temporary, full-time position (02/28/2025 to 06/12/2026)
Guelph, ON**

Reporting to the Senior Manager, Legacy Giving, the Manager, Legacy Giving and Stewardship (MLGS) is responsible for legacy giving fundraising (gifts in wills and estates). The MLGS is expected to personally generate a minimum of \$1 million in future revenue annually through the confirmation of 10 legacy gifts. The MLGS works to secure future revenue with an external audience ranging from alumni, donors, and friends of the University of Guelph. This occurs through donor qualification, cultivation, solicitation, and stewardship.

Your key responsibilities will include:

- Undertake complex legacy giving (planned giving) discussions with donors, friends, and alumni to promote legacy giving to achieve the University of Guelph's fundraising priorities and create future revenue for the university while creating a legacy for donors on campus
- Personally manage a robust pipeline of 75+ university-wide donor relationships with individuals interested in confirming a new legacy gift to benefit the University of Guelph.
- Complete a minimum of 8 - 10 in-person meetings per month with legacy-giving prospects
- Build strategies to manage personalized outreach to donors requesting information about legacy giving
- Create strategies to engage historically identified legacy-giving leads and new leads that fit a legacy-giving profile.
- Provide an exceptional level of service to these complex and sensitive conversations.
- Connect with lawyers, financial advisors, and estate planners to discuss their clients' plans.

The university is currently stewarding confirmed deferred gift expectancies from over 600 donors, with deferred/future gift expectancies currently valued at over \$90 million. Additionally, the MLGS is responsible for the following:

- Personal stewardship of assigned prospects, meet to learn more about the estate gift and deepen donors' relationship with the University to encourage the growth of the estate gift and explore giving opportunities during their lifetime.
- Mass Stewardship - Create innovative personal stewardship outreach for identified members of the J.D. MacLachlan Society members including VIP members with gifts \$250,000 +. This includes mass mailings and events.
- Make sure legacy-giving conversations are documented accurately. Accurately recording the information about a legacy gift is an important task that helps in the eventual administration of the gift when it is received (sometimes decades later).

QUALIFICATIONS

To be considered for the role of Manager, Legacy Giving and Stewardship, your profile should include:

- An undergraduate degree in a related field, along with three and a half (3.5) years of fundraising experience with a proven track record in legacy/estate giving fundraising, ideally in a higher education setting.
- Certified Fund-Raising Executive (CFRE) designation is preferred
- Familiarity with CAGP (Canadian Association of Gift Planners) and the resources, training, and guidelines they provide. Preference for attendance in CAGP courses: Gift Planning Fundamentals and/or Original Canadian Gift Planning Course
- Extensive knowledge of legacy giving, the complex gift vehicles, and the tax consequences of these gifts
- University or other public sector fundraising experience, with a proven track record of success securing legacy gifts and other philanthropic gifts
- High levels of emotional intelligence and empathy during delicate conversations and ability to navigate emotional conversations with sensitivity.
- Awareness of death literacy and the psychology of legacy giving.
- Superior interpersonal communication skills, including effective relationship-building
- Ability to think and act quickly and effectively under pressure, exercising tact, diplomacy, discretion, and good judgment.
- Proven ability to interact effectively with lawyers, financial advisors, and other experts who are involved with legacy gifts
- Excellent written and oral communication skills.
- Microsoft Office Suite of programs
- Excellent analytical, communication, and interpersonal skills.
- Ability to multi-task.

The University of Guelph (www.uoguelph.ca) is one of Canada's leading research-intensive comprehensive institutions, with a record of outstanding scholarship in the arts, humanities, social sciences, life sciences, physical and engineering sciences, agriculture, and veterinary sciences. This is your chance to join us in our endeavor to improve life.

To view a detailed posting for the role of Manager, Legacy Giving and Stewardship, please go to our website at www.uoguelph.ca/hr/careers.

At the University of Guelph, fostering a [culture of inclusion](#) is an institutional imperative. The University invites and encourages applications from all qualified individuals, including from groups that are traditionally underrepresented in employment, who may contribute to further diversification of our Institution.