



CANADA
GIVES ✦

Philanthropic Planning Associate

Join a team of professionals who are passionate about helping charitable clients build very personalized Donor Advised Funds to become active grant making foundations. Canada Gives is a nationally registered charity, supporting major donors and their advisors across Canada. They are currently hiring a **Philanthropic Planning Associate** in Collingwood, ON.

The Role:

The **Philanthropic Planning Associate** will report directly to the Director of Foundations & Donor Services, provide exceptional services to our DAF donors to help them develop giving strategies that fit their unique goals and objectives, and ensure that impact is felt equally by the donor family and the charities they choose to support.

Duties include but are not limited to:

- Provide exceptional support to our new and existing donors, their advisors and charities
- Implement and facilitate existing gift planning strategies
- Conduct in-depth charity research and produce detailed charity reports
- Work with charity partners to design impactful gifts on behalf of our donors
- Prepare, review and facilitate gift agreements where appropriate
- Implement and monitor minimum disbursements, recurring gifts and multi-year commitments
- Support the grant processing team
- Manage, update and continuously monitor the donor client tasks list
- Implement estate and legacy giving strategies
- Work in collaboration with the Director of Foundations & Donor Services to develop and implement new resources and strategies to enhance the philanthropic planning services
- Stay abreast of charity sector developments, legislation changes and other relevant matters affecting charitable giving
- Work within multiple systems to input and manage donor data

Qualifications

- 5+ years working with high net worth donors in a large Canadian charity
- Extensive knowledge of the Canadian charitable sector and navigation of the CRA Charities Directorate
- Outstanding donor relations, research and communication skills
- Familiarity with family and multi-generational philanthropy



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- Strong networking and partnership development skills
- Strong technical knowledge in donation strategy and estate planning is of value
- Proficiency in Microsoft Office, including Word, Excel, Outlook, and CRM
- Well-organized and able to manage time independently
- CFRE or MFA-P designation is preferable

Core Competencies

- Excellent communication skills
- Strong attention to detail and problem-solving skills
- Demonstrates warmth & confidence when interacting with others
- Collaborative within the organization
- Flexibility required for growth in an entrepreneurial environment
- Philanthropic spirit

Candidates must be legally employable in Canada to be considered for employment.

We are committed to fair and equitable recruiting practices. Canada Gives is an equal opportunity employer and also welcomes and encourages applications from people with disabilities. Accommodations are available on request for candidates taking part in all aspects of the selection process.

If you are interested and qualified for this position, kindly forward your resume to clientservices@canadagives.ca