



Habitat for Humanity International (HFHI) is currently seeking a talented professional for the role of a **Planned Giving Officer**. The Planned Giving Officer is responsible for identifying, cultivating, soliciting and stewarding planned gift prospects through a **qualified portfolio** within a geographic territory, responding to planned giving inquiries, and working collaboratively with special and major gift colleagues as well as local Habitat offices.

This position will be based in Atlanta, GA.

Primary Responsibilities:

- **Portfolio Development:**
 - Manage and grow a portfolio of 150 qualified planned gift prospects from the constituent relationship management (CRM) database within a defined geographic territory;
 - Assist Special and Major Gift colleagues, and local Habitats within a region, in cultivating and soliciting planned gifts
 - Respond to inquiries sent to the Planned Giving mailbox and through marketing efforts

- **Cultivation:** Complete and document 120 substantive calls and/or face-to-face visits per year with planned gift prospects. Substantive calls are defined as those that either include an "ask" for a planned gift or clearly advance the relationship toward "an ask". A good example of a substantive call is the presentation of a gift annuity proposal followed by asking for the business

- **Database integrity:** Keep up-to-date CRM records on donor/prospect actions to demonstrate progress toward goals and track collaborations with other development officers. Secure and record up-to-date biographical data. Use CRM to prepare weekly, monthly and quarterly reports as necessary. Use CRM to evaluate effectiveness of cultivation, and solicitation strategies. Also included in this category is continuing education to keep current with CRM skills, tax law changes and planned giving techniques

- **Local Habitat activities:** Encourage and assist local Habitat offices as they establish their own planned giving programs. This will include helping local resource development officers to prepare planned gift proposals and coaching them on presenting the proposals, as well as the development of internal planned giving programs. Depending upon the level of involvement, these activities may also be considered substantive calls

Required Qualifications:

- Bachelor's Degree or equivalent work experience
- **5+ years in fundraising and planned giving.**
- Fondness for and appreciation of the wisdom and experiences of our more mature citizens; ability to gain their trust
- Excellent listening skills
- Superior presentation and communication skills, including the ability to write and speak clearly and effectively
- 3+ years of experience **collaborating, cultivating and closing planned gifts**; demonstrated track record
- Attentive to detail and commitment to full utilization of CRM software for recordkeeping
- Unquestionable integrity
- Creative self-starter with high energy level, self-confidence and positive attitude
- Passion for and commitment to the HFH vision
- Working knowledge of planned giving techniques;
- Ability and fondness for working collaboratively with colleagues.

Preferred Qualifications:

- Financial planning and sales background a plus