

Bequest Relationship Specialist

About us

Australian Red Cross is part of the largest humanitarian movement in the world seeking to build a better society based on people helping people.

Our vision is to inspire people to do good their way. We want to engage and inspire supporters to take action by putting them at the heart of all that we do. When supporters engage with Red Cross, we want them to have the best possible experience and create meaningful, lifelong giving connections.

About the role

Bequests represents a significant revenue stream for Australian Red Cross. This role will develop and lead the implementation of the organisation's bequest strategy with the aim of increasing income, deepening relationships with bequestors and building a robust pipeline.

A key responsibility will be the relationship management of confirmed, intending and considering bequest donors to maximise retention rates and conversion. Additionally you will establish an ongoing acquisition program to support growth of the pipeline.

You will also work with the Bequest Administrator to represent the interests of the donor and Red Cross in the journey of administering a bequest gift and will be responsible for ensuring that all bequest income entitled to be received by Australian Red Cross is accurately forecasted and that estate distribution occurs within anticipated timeframes.

You will be responsible for:

- Work with the Offline Channel Manager to ensure delivery of the bequest program including the annual budget, pipeline, growth and relationship strategy
- Implement a multi-faceted targeted program (including digital, direct mail, phone, face-to-face) which identifies, solicits, cultivates and stewards bequest donors
- Collaborate with internal stakeholders to maximise lead generation activities, conversion strategies and retention across programs
- Provide exceptional relationship management and deliver a tailored stewardship journey for confirmed, intending and considering bequest donors
- Identify opportunities to proactively promote the bequest program to the Australian public to cultivate leads and awareness
- Accurately maintain the Red Cross bequest pipeline of projected income and take ownership of financial reporting, including accurate and up-to-date weekly/monthly reports and reforecasts for the program
- Work with Data & Insights team to develop a suite of reports to monitor the performance of and identify improvements to the bequest program
- Ensure all bequest related content is kept up-to-date across different channels and lead development of bequest materials as required

What you will bring

Demonstrated experience in bequest program management
Exceptional interpersonal and relationship building skills
Proven experience in management of financial reporting and budgeting
Strong knowledge of legal matters and legislative requirements pertaining to bequests
Developed negotiation skills, ideally with experience in mediation
Highly developed communication and interpersonal skills with the ability to influence key stakeholders

Why work for us?

This is a great opportunity to grow your experience within fundraising and work on one of the country's biggest Regular Giving programs. Additionally, you will have access to generous salary packaging options that can increase your take home pay by paying certain expenses using pre-tax dollars up to \$15,900 a year.

Further information and application

For further information please see position description below. For additional enquiries please contact Sophie Helou on 02 8651 8865. PD  [Bequest Relationship Specialist.pdf](#) | closing date: Sunday 14th March 2021

Please Apply via <http://careers.redcross.org.au/cw/en/job/517560?ApplicationSubSourceID=11220>