



Position Title: Relationship Manager, Future Giving (Gifts in Wills)  
Reports to: Head of Philanthropy and Partnerships (HOPP)  
Position Type: 3 days. Part-Time.  
Location: FLEXIBLE with 2 days per week in office. Open to Location.

**You will secure future gifts (planned gift commitments) for JDRF by fulfilling the interests and passions of donors by providing them with opportunities, listening and learning about the donor's Will (Planned Giving) related interests and asking them to make a gift in their Will.**

Supporting the Head of Philanthropy and Partnerships, you will help refine and implement the Gifts in Will strategy to grow and deepen relationships. You will collaborate to deliver donor-centric collateral, lead generation plan (utilizing Dataro AI) and to raise the profile of the GIW program to internal and external stakeholders including staff, supporters and donors, as well as third parties, such as wills and estates lawyers, financial planners and trustee companies.

#### **ABOUT THE ROLE**

Be excited to grow yourself in the Veritus approach to fundraising. This includes implementing donor-focused processes and utilizing the Donor Engagement Plan (DEP).

- Actively solicit gift prospects for current, planned and blended gifts, and manage an assigned caseload of ~320 (Intender, Interested, Confirmed, reconfirmed) to be qualified by following the Veritus 7-step qualification process to result in a portfolio of no more than 150 donors.
- Create and manage individual strategies (via DEP) for each donor that is driven by that donor's passions and interests while addressing their concerns related to estate and financial planning with an appropriately crafted planned gift proposal. This will serve as a foundational communication and marketing plan for each person in your portfolio.
- Closely collaborate with the HOPP and your teammates to deliver relevant segment needs such as compelling proposals and impact reporting, maximizing results, avoid duplication of effort, and ensure comprehensive follow-up.
- Create monthly reports on portfolio progress.
- Perform other major and planned gift donor activities as required.

#### **YOUR PERFORMANCE WILL BE MEASURED BY**

- Creating strategies to cultivate, solicit and close planned gifts, including maintenance of donor records within the Salesforce platform.
- Achieving overall agreed-upon production goal based on individual donor strategies, meeting agreed upon numbers of asks and value of gifts.
- Securing program and organization information, as well as information relating to the donors gift in Will related interests, which result in the creation and writing of appropriately crafted proposal.
- Creating timely reports that reflect portfolio performance.
- Management of process, deadlines and budget while adhering to the policies and procedures of the organization.
- How well you get along with peers and management and maintain a positive and constructive attitude while solving problems. Being a team player and protect the mission, goals and values of the organization.

### **THE IDEAL CANDIDATE SHOULD HAVE**

- A preference for a background in developing a GIW program with a focus on pipeline development from interested to confirmed.
- A preference for the ability to manage estate administration and manage effective and professional communication with legal entities.
- Strategic mindset and ability to connect our mission to larger strategic goals.
- An incredible passion for our mission that invigorates and excites everyone around you.
- Outstanding attention to detail; proactive approach, taking accountability for outcomes.
- High level computer skills in the Microsoft Office suite.
- Driven individual with sound judgement and problem-solving capabilities.
- FIA Code Compliant.

### **WHY WORK FOR US?**

- Work-life balance with hybrid and flexible work structure (minimum 2 days in office), including company equipment to facilitate transition between office and home
- Salary sacrifice options and benefits to increase take home pay
- Team building with twice annual TEAM meetings in Sydney
- Employee Assistance Program + 1 wellness day per year + family leave
- Learning and Development provided to have the skills you need for your role

### **WHY JDRF**

JDRF has transformed the understanding of Type 1 Diabetes and been a part of every breakthrough in T1D care in the last 50 years. Every single dollar raised is committed to taking a cure from hope to reality – while making the lives of people with T1D easier, safer, and healthier until that happens. JDRF is a national not for profit organisation with offices in five states as well as being part of a Global affiliation across six countries. Learn more [HERE – Living with T1D: A film by JDRF](#).

If you are passionate about what you do and making a difference, then we want to hear from you. To apply, please forward your cover letter and resume to Kari Musick on [kmusick@jdrf.org.au](mailto:kmusick@jdrf.org.au)