

sage | Advocacy &
Services for
LGBTQ+ Elders

We refuse to be invisible[®]

SAGE

Director of Philanthropic Legacy

New York, NY (Hybrid) or South Florida (Remote)

drg talent
consulting
experts

sage

Background

SAGE is the world's largest and oldest organization dedicated to improving the lives of lesbian, gay, bisexual, and transgender (LGBTQ+) older adults. Founded in 1978 and headquartered in New York City, SAGE offers supportive services and consumer resources for LGBTQ+ older adults and their caregivers, advocates for public policy changes that address the needs of LGBTQ+ older people and provides cultural competency training for aging providers and LGBTQ+ organizations, largely through its National Resource Center on LGBTQ+ Aging and its growing social enterprise SAGECare.

Position

The Director of Philanthropic Legacy position will report to the Chief Development Officer, and work with the development team and other colleagues to strengthen existing planned giving efforts, increase membership in SAGE's recognition society for legacy donors (called the Taylor Society), and build and execute an intentional strategy for increasing legacy gifts for SAGE and develop and execute a strategy to launch the "Legacy Project."

The Director will lead the ongoing work of SAGE's planned giving program, and, in consultation with the department's leadership, will be responsible for establishing objectives and priorities for the program, in concert with SAGE's strategic plan, to identify, cultivate and solicit planned giving prospects to ensure a strong base of ongoing financial support for SAGE. An ongoing aspect of that work is educating existing supporters and potential legacy donors about the critical importance of legal and financial life planning.

In addition to ensuring SAGE's legacy through planned gifts, the Director will have an exciting opportunity to ensure that the LGBTQ+ community at large has the tools and resources to protect its values and legacy for equality through the Legacy Project. The Legacy Project will develop a cadre of estate planning and financial professionals who regularly work with LGBTQ+ individuals and families, and who commit a) to raising with each of their clients the possibility of leaving a charitable gift; b) developing expertise and comfort in having those conversations; and c) are aware of the organizations locally and nationally serving the LGBTQ+ community.

Responsibilities

- Develop and execute strategies to identify, research, cultivate and solicit qualified prospects for planned gifts and membership in the Taylor Society, through targeted mailings, surveys, collateral, and website content, to name a few.
- Support and partner with CDO and executive staff to steward, cultivate and solicit current and prospective major donors and Taylor Society members in SAGE's key markets, including coordination of face-to-face cultivation, solicitation, renewal and stewardship actions for top-tier legacy donors and prospects.

- Prepare tailored planned gift proposals and work with donors and donor representatives to facilitate planned gifts.
- Manage a portfolio of planned giving donors who have indicated an interest in making a deferred or planned gift through trusts, charitable annuities, life insurance, wills, and bequests.
- Respond to donor inquiries with appropriate information on bequests, life income gifts and other gift-planning vehicles.
- Collaborate with the major gifts team to integrate planned giving goals and objectives in all fundraising activities.
- Maintain working relationships with the Legacy Project members and other professionals to build knowledge of planned giving vehicles and trends in the profession.
- Lead the processing and acknowledgement of gifts from estates and trusts, oversee the status of all open estates, trusts and charitable gift annuities.
- Communicate regularly with donors, trustees, executors and, if needed, pro bono counsel to ensure timely resolution of concerns and receipt of planned gifts.
- Cultivate relationships with attorneys, trust officers, accountants, financial planners and other estate planning professionals regarding gift opportunities for clients and provide material for their use, exchange up-to-date information on current best practices, request help in obtaining referrals and discuss donor interests.
- Develop knowledge of estate planning tools and remain current on relevant laws, regulations, and techniques through self-study, professional memberships, conferences, and webinars.
- Other duties may be assigned or removed depending on the needs of the department and organization.

Qualifications

- The candidate must have a passion for SAGE's mission to improving the lives of lesbian, gay, bisexual, transgender and queer or questioning (LGBTQ+) older people.
- Must have knowledge in LGBTQ+, diversity, equity and inclusion.
- Minimum of 5 years of relevant work experience in planned giving, estate planning, trusts and estates law.
- Understanding of planned giving and experience with soliciting planned gifts and the types of legacy gifts.
- Excellent interpersonal skills with a strong ability to communicate effectively in person, on the phone and in writing.
- Experience building relationships in a strategic and intentional manner leading to fundraising success.
- Capacity to work easily and effectively with a wide range of people.
- Comfortable working in a fast-paced, flexible, collegial, goal-oriented and entrepreneurial environment.

- Excellent organizational skills and attention to detail.
- Self-starter with ability to work independently, research, analyze, set goals, communicate and manage projects to completion is required.
- Collaborative spirit in working with SAGE leadership and volunteers to identify and cultivate donors.
- Proficient in Microsoft software (Word, Excel, Outlook, PowerPoint) along with basic database entry, reporting, and maintenance.
- Salesforce experience is strongly preferred.

Compensation Package

This is an outstanding opportunity for a highly motivated fundraising professional to join a growing department and organization. SAGE is prepared to offer a salary range of \$120,000-135,000. In addition, SAGE offers a generous benefits package including:

- Medical
- Dental
- 401k and Company match
- Vision
- PTO including Vacation, Sick, and Personal Days
- Life Insurance
- FSA/HRA/Dependent Care

SAGE is an Equal Opportunity Employer that does not discriminate on the basis of actual or perceived race, ethnicity, creed, color, religion, sex or gender, sexual orientation, gender identity, gender expression, alienage or national origin, ancestry, age, citizenship status, marital or family status, family medical history or genetic information, veteran status, HIV serostatus, military or military discharge status, height, weight, disability or handicap, domestic violence victim status, employment status, socioeconomic status, criminal history or arrest record, sexual or other reproductive health decisions, natural hair or hairstyle, or any other status or characteristic protected by applicable federal, state, or local laws. SAGE is dedicated to this policy, with respect to all matters concerning employment.

To apply for this position, please click [HERE](#).

Natalia Kepler, Senior Talent Consultant
Dave Yi, Associate