

Job Description Planned Giving Officer

Job title: Planned Giving Officer
Directorate: Fundraising
Location: Head Office
Accountable to: Head of Planned Giving
Pay grade: 5.16
Type: Permanent

Values Framework

All staff are expected to know and understand the values of the organisation and uphold these values whilst at work.

- Together
- Focused
- Bold
- Personal

General Overview of Role

- To provide general support to the Head of Planned Giving and the Senior Planned Giving Officer and any subsequent roles included within this team.
- To help in all areas of administration such as the notification of legacies due to Combat Stress, to ensure they are correctly entered and administered as per the procedures.
- To help coordinate thanking all legacy supporters and the general administration
- To assist with any other tasks with fall within the Planned Giving area.
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Main Duties and Key Responsibilities

- To be responsible for a portfolio of supporters, ensuring they are thanked promptly, any queries are answered and they are thanked promptly
- To adhere to the stewardship strategy for Planned Giving
- Working as team player, helping to create communications for portfolio stewardship and legacy recruitment
- Attending charity events when needed, maintaining the highest level of professionalism
- To work with the Head of Planned Giving to help with the inputting of information about legacy income
- Helping with mailing such as the newspaper, appeals, event invitations etc
- To take responsibility for the information used to create monthly reports to directors which the charity relies on for budgeting purposes
- Responsibility to ensure interim funds are noted correctly
- Working with other fundraising teams to ensure prospects are being stewarded by the most appropriate team.
- Ensuring RE records are kept fully up to date with supporter information.
- Ensuring GDPR is adhered to in all instances.
- Any other reasonable duties as required within the role.

Risk Management

As an employee of the Charity, the postholder is required to be risk aware and readily able to identify risks faced in the course of day-to-day duties. Where a new risk is identified it is to be reported through the postholder's line manager.

Date created _____

Signature, post holder _____

Print name _____

Date _____