

**Job Description**  
**Development Officer, Planned Giving and Endowment**  
**Jewish Federation of Northern New Jersey**

**Department:** Endowment Foundation  
**Reports to:** Managing Director and Assistant Executive Vice President, Endowment Foundation  
**Status:** Full-time Exempt Position  
**Location:** Northern New Jersey

**Background info:**

Jewish Federation of Northern New Jersey is a non-profit philanthropic organization dedicated to creating a vibrant Jewish community in northern New Jersey. Federation cares for those in need, deepens engagement in Jewish life, and strengthens the bonds among Jews in the northern New Jersey area, in Israel, and around the world. Its primary functions are community planning and allocations, financial resource development, and leadership development.

**Position Summary:**

The Development Officer, Planned Giving and Endowment will work to grow, facilitate, and engage donors in the work of the Endowment Foundation. Federation's Endowment Foundation is responsible for raising dollars for the future through various planned giving vehicles. It also manages a Donor Advised Fund program and invests endowment assets for agencies within the Federation's catchment area. Goals include growing current assets under management as well as obtaining commitments for future gifts in order to support the mission of the Federation for future generations.

**Responsibilities:**

1. Financial Resource Development and Donor Relations:  
Help grow Foundation assets, including unrestricted, field of interest, Agency and Donor Advised Funds (DAFs), including the following:
  - a. Identify and cultivate legacy and/or DAF prospects and solicit gifts.
  - b. Steward a portfolio of existing endowment and/or donor advised fund donors.
  - c. Manage a small portfolio of long-time donors for Annual Campaign solicitations.
  - d. Develop cohort of professional advisors.
  - e. Promote endowments within Federation and in the community.
  
2. Volunteer and Lay Leadership:  
Facilitate the work of various Endowment Foundation committees, with particular emphasis on Investment, Insurance, and Policy sub-committees, including the following:
  - a. Assist in planning agendas and ensuring preparedness for all meetings.
  - b. Convene Insurance Review Committee to review endowment life insurance policies.
  - c. Raise awareness of policy issues confronting the Foundation and ensure review and compliance. Convene Policies and Procedures Committee as needed. Update policy documents.
  - d. Work with Circle of Partners Committee to plan programs.
  - e. Compose minutes for all committee meetings.

3. Record-keeping and Operations:  
Ensure that assets are tracked correctly, including the following:
  - a. Track endowment life insurance policies to record current values and ensure records are up to date.
  - b. Review and reconcile monthly investment statements.
  - c. Review and prepare paperwork pertaining to new investments.
  - d. Ensure annual review of Supporting Organizations.
  
4. Event Coordination:  
Plan and execute programs to further Endowment Foundation goals and objectives, including:
  - a. Work with Manager to conceive and plan programs and events to further engage and build relationships with prospects/donors/professional advisors and/or other appropriate constituents, often in collaboration with other departments and/or lay leadership within the organization.
  - b. Solicit corporate sponsors to subsidize program costs.
  - c. Interface with marketing team and other departments to maximize press coverage and recruitment.

**Qualifications and Skills:**

- BA/BS degree.
- Basic knowledge of planned giving products and tools.
- Excellent organizational skills.
- Ability to prioritize and manage multiple tasks with accuracy, attention to detail, and confidentiality.
- Self-starter, with the ability to work effectively as part of a team.
- Outstanding interpersonal and communication skills, with demonstrated ability to communicate professionally and effectively.
- Demonstrated computer proficiency, particularly in Microsoft Office (Word, Excel, Outlook).

Please submit cover letter and resume to [jobs@ifnnj.org](mailto:jobs@ifnnj.org)