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# Example of Planning Executive Job Description

Our company is growing rapidly and is searching for experienced candidates for the position of planning executive. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for planning executive

* Create and implement a strategic plan for maximizing gift planning opportunities in the USAFA donor community, including graduates, parents, friends, and individuals
* Build and manage a portfolio of donors engaged in gift and estate planning conversations with an emphasis on principal gift opportunities at the $1 million+ level
* Provide required support to the Vice President, Development and development officers on promoting and executing complex gift and estate plans
* Maintain oversight of the entire gift planning pipeline of donors, including those individuals managed by other gift officers, to ensure proper progression with gift planning opportunities
* Work closely with the Director of Research & Prospect Management to (1) develop the Endowment’s “planned giving donor profile”, (2) identify new prospects with emphasis on $100,000+ opportunities, and (3) ensure an effective assignment process/strategy of new gift planning prospects to Endowment development officers
* In coordination with the Vice President, Development, inform comprehensive campaign planning and execution, including but not limited to (1) developing and implementing a campaign plan specific to the portion of the campaign goal that will be testamentary gifts, and (2) developing campaign counting guidelines
* Create and implement a strategic marketing plan for gift planning
* In collaboration with the Director of Stewardship and Donor Relations, develop a strategic stewardship plan for members of the Polaris Society (those individuals who have provided documentation of an estate plan including USAFA to the Endowment)
* Provide staff support and guidance to the Planned Giving Committee of the USAFA Endowment Board
* Provide once or twice-yearly training on gift planning instruments to the Endowment’s development staff

## Qualifications for planning executive

* Strong expertise with MIS & reporting tools, Word, Excel, & MS Office tools
* Typically holds a Bachelor's Degree in any discipline, with Commerce subjects at least at an intermediate level
* Thorough knowledge of Financial Management, budgeting, and charge-out methodologies
* Demonstrated ability to work well with others in a matrix environment
* Drives Innovation and Change -Demonstrates ability to think strategically and tactically about the involved processes, with strong independent problem solving skills -Utilizes collaborative working practices with a strong ability to deal with ambiguity/conflicting objectives
* The ideal candidate will have a good understanding of overall business strategy including market trends and business analytics