

## **VOLUNTEER POSITION DESCRIPTION**

### **MARKET PLANNED GIVING COMMITTEE CHAIR**

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| <b>POSITION TITLE:</b> | Market Planned Giving Committee Chair                            |
| <b>RESPONSIBLE TO:</b> | Market Board Chair   |
| <b>STAFF PARTNER:</b>  | Executive Director of Market Development or Senior Staff Partner |
| <b>TERM:</b>           | Three (3) Years  |

#### **Overview**

Appointed by the Market Board Chair, the Planned Giving Committee Chair should be a member of the Market Board. Working cooperatively with the Market staff person(s) assigned to planned giving, the Chair leads the committee in developing strategies to promote and secure gifts through wills, securities, insurance policies, trusts and similar instruments as well as directing cultivation of local estate/financial planning professionals. The chair is also responsible for reporting activity to the Market Board.

The chair should be a well-known civic leader possessing enthusiasm for the March of Dimes mission, have the ability to preside effectively over meetings, have a willingness to devote the necessary time to advise and/or coordinate planned giving efforts in the Market, and must attend meetings leading by example in furthering every interest of March of Dimes.

#### **Responsibilities**

- Provide leadership for the Planned Giving Committee including agenda setting, correspondence, assist with training on planned giving for designated staff and volunteers.
- Provide guidance in setting goals and priorities for the Planned Giving Committee in conjunction with the Market Executive Director and National Planned Giving Director.
- Identify and assist in the recruitment of volunteers to serve on the committee.
- Serve as a local consultant to Market staff assigned to the planned giving program.
- Coordinate planned giving meetings, seminars, training programs, etc.
- Lead the development of a referral program for professionals in estate and financial planning.
- Assist in the annual evaluation of planned giving efforts in the Market.
- Speak at planned giving seminars, writes articles for newsletters, and assist planned giving director with calls and visits as requested.
- Set up a personal planned gift and declare membership in *Roosevelt Society Legacy Circle*.

#### **Desirable Qualifications**

The chair should have specialized knowledge of estate law, accounting, banking, estate planning or insurance etc., or be in a position to recruit these professionals to the Committee. The chair should understand the needs of March of Dimes, be committed to the mission, inspire trust, confidence and enthusiasm.

#### **Ethical Standards**

The Planned Giving Committee Chair agrees to adhere to March of Dimes ethical standards, code of conduct and the Model Standards of Practice for Charitable Gift Planners.