

VOLUNTEER POSITION DESCRIPTION

MARKET PLANNED GIVING COMMITTEE MEMBER

POSITION TITLE:	Market Planned Giving Committee Member
RESPONSIBLE TO:	Market Planned Giving Committee Chair
STAFF PARTNER:	Executive Director of Market Development or Senior Staff Partner
TERM:	Three (3) Years

Overview

Under the leadership of the Planned Giving Committee Chair, members of the Planned Giving Committee have responsibility for developing and implementing a planned giving promotional plan in the Market. The committee is comprised of key individuals from the Board and community who can provide guidance for all matters related to promoting gifts through wills, securities, insurance policies, trusts and similar instruments as well as cultivating local estate/financial planning professionals and March of Dimes constituents.

Responsibilities

- Assist in setting goals and priorities for promoting planned giving in the Market.
- Identify and assist in the recruitment of volunteers to serve on the committee.
- Serve as a local consultant to Market staff assigned to planned giving program.
- Attend planned giving meetings, seminars, training programs, etc.
- Assist in the development of a referral program for professionals in estate and financial planning.
- Assist in the annual evaluation of the planned giving efforts in the Market.
- Speak at planned giving seminars, write articles for newsletters, and assist Planned Giving Director with calls and visits as needed.
- Set up a personal planned gift and declare membership in the *Roosevelt Society Legacy Circle*.

Desirable Qualifications

The committee member 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 committee member should understand the needs of March of Dimes, be committed to the mission, inspire trust, confidence and enthusiasm.

Ethical Standards

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