

Title: Associate Director, Gift and Estate Planning
Status: Full time
Reports to: Vice President, Development
Salary: \$104,000 to \$114,000

St. Joseph's Health Centre Foundation inspires philanthropy to support the delivery of extraordinary care close to home. Our vision is to transform St. Joe's as a leading community academic hospital that meets the needs of Toronto's west end now and for future generations. With a growing and aging population, our Home of Extraordinary campaign represents the largest healthcare transformation in the west end, creating a unique opportunity for donors to leave a meaningful legacy that shapes the future of care.

Philanthropy at the Foundation is rooted in values, trust, and relationships. Donors, volunteers, and community members are at the heart of our work, and every gift is an opportunity to impact patients' lives profoundly.

Position Summary

The Associate Director, Gift & Estate Planning provides strategic leadership for the Foundation's planned giving program and serves as a trusted technical expert in gift and estate planning. The role leads the design and execution of the legacy giving strategy for our current Home of Extraordinary campaign, while also stewarding and growing a sustainable, long-term planned giving program beyond the campaign.

The Associate Director combines hands-on donor engagement with high-level strategic leadership. The majority of this role is donor-facing, cultivating and stewarding relationships with legacy donors, prospects, and professional advisors. Success is measured by the growth of legacy expectancies, pipeline health, donor engagement, and the contribution of legacy giving to both campaign and long-term fundraising goals.

Key Responsibilities you'll be leading

Time-bound responsibilities tied to the current campaign:

Legacy Campaign Strategy & Integration

- Lead the legacy campaign strategy in collaboration with the Vice President, Development and Senior Leadership Team, aligning priorities, messaging, and activation timelines with the broader campaign.
- Identify and activate opportunities to integrate legacy giving across all campaign pillars, ensuring consistent and compelling messaging for donors, volunteers, and staff.



- Advise senior leadership on campaign positioning, best practices, and activation strategies specific to legacy giving within a comprehensive campaign environment.
- Design and implement a **Legacy Expectancy Challenge** to inspire new commitments, broaden donor participation, and accelerate campaign momentum.
- Serve as an ambassador for legacy giving during the campaign, building awareness, credibility, and trust across the community.

Legacy Campaign Volunteer Leadership

- Lead the evolution of the Advisor Council into a **Legacy Campaign Committee**, recruiting values-aligned volunteer leaders to support campaign goals.
- Equip and support volunteers to participate in peer-to-peer outreach, donor conversations, and campaign activities related to legacy giving.
- Partner with campaign leadership to align volunteer engagement with key milestones and fundraising priorities.

Evergreen responsibilities that extend beyond the campaign:

Legacy Giving Program Leadership & Technical Expertise

- Serve as the Foundation's internal subject matter expert on planned giving vehicles, including bequests, life insurance, securities, annuities, charitable remainder trusts, and blended giving strategies.
- Guide donors and their professional advisors (lawyers, accountants, financial planners) through complex estate and legacy planning discussions with integrity, clarity, and compassion.
- Ensure all planned gifts comply with Foundation policies, legal requirements, and regulatory standards.
- Mentor and coach Foundation staff, volunteers, and major gift colleagues to build organizational fluency and confidence in legacy giving conversations.

Donor Engagement, Solicitation & Stewardship

- Maintain and manage a portfolio of planned giving, intermediate, and major gift donors, with significant time dedicated to cultivation, solicitation, and stewardship.
- Identify and advance opportunities for **blended giving**, linking legacy commitments with current gifts or pledges to maximize donor impact and engagement.
- Collaborate with Communications and Donor Engagement teams to ensure legacy donors are recognized and stewarded through tailored communications, campaign materials, and stewardship programs.



Pipeline Growth, Analytics & Reporting

- Build and sustain a robust legacy pipeline through direct donor engagement, volunteer involvement, and collaboration with the Annual Program.
- Leverage segmentation and data analytics to design targeted outreach for legacy society members, interested donors, and qualified prospects.
- Track, analyze, and report on legacy expectancies, pipeline health, donor engagement, and revenue projections, adjusting strategies to optimize both campaign and long-term results.

Your Qualifications & Experience

- Deep expertise in gift and estate planning, including bequests, life insurance, securities, annuities, charitable remainder trusts, and blended gifts
- Knowledge of gift acceptance policies, regulatory requirements, and ethical best practices
- Experience guiding donors through sensitive, values-driven legacy conversations with empathy and discretion
- Experience working with professional advisors and translating complex technical concepts into donor-centred guidance
- Strategic thinking and ability to synthesize complex information into clear recommendations
- High degree of professionalism, discretion, and judgment in handling confidential information
- Strong interpersonal, verbal, and written communication skills
- Ability to manage multiple priorities, timelines, and initiatives independently while collaborating effectively with teams
- Experience developing donor communications, stewardship strategies, and campaign-aligned materials
- Proficiency with donor databases such as Raiser's Edge and MS Office applications
- University or college degree required

Your Key Competencies & Attributes

- Values-driven and donor-centered approach
- Strong judgment, emotional intelligence, and relational skills
- Collaborative mindset, able to work with volunteers, senior leaders, and campaign teams
- Strategic thinker with executional discipline
- Passion for philanthropy and improving healthcare in the community

Reporting & Relationships

- Reports to the Vice President, Development and collaborates closely with:
 - Senior Leadership Team
 - Major Gifts team
 - Annual Program for legacy lead generation
 - Communications and Donor Engagement Teams
 - Board members and volunteer advisors



This is how we'll support you:

- Hybrid work environment – 3 days/week in-office
- Competitive compensation with comprehensive health benefits
- Professional development opportunities
- Membership into HOOPP – a leading defined-benefit pension plan

Applications will be reviewed on an ongoing basis before the application deadline closes.

We thank all applicants for applying, however, only qualified candidates selected for an interview will be contacted.