

The University of Akron
Classification Specification

Job Title: Coord Ctr for Gift & Estate Planning
Job Function: Staff
Job Family: Classified
SOC Description: 4000 Business / Administrative Division

Job Code: 44375
Grade: 118
FLSA: Non-Exempt
Date: 2/19; 2/10

Job Summary:

Assist the Center Director by providing complex and diverse administrative duties in support of the Center for Gift and Estate Planning. Interacts with planned giving donors, attorneys, financial advisors, and relevant campus partners such as the Office of General Counsel to secure and process planned giving documents.

Essential Functions:

Assist the Director of the Center for Gift and Estate Planning with the processing of estates, trusts, IRAs or other planned gift commitments for which the University has been named a beneficiary, including but not limited to: Processing and following up on initial Probate Notices and other documents throughout the estate administration; Reviewing planned giving documents to determine the University's beneficiary interest; Preparing gift acknowledgment receipts and other correspondence; Coordinating the execution of necessary legal documents by authorized UA or UAF individuals.

Archive and maintain planned giving files and documenting planned gift commitments on the bequest panel in the Department of Development's database.

Assist the Director of the Center for Gift and Estate Planning with the preparation of planned gift illustrations and proposal materials for prospective donors.

Coordinate events hosted by the Center for Gift and Estate Planning.

Prepare outgoing correspondence. Route planned giving documents, as needed.

Assist with the preparation and distribution of print and electronic marketing materials on behalf of the Center for Gift and Estate Planning.

Education:

Requires 18 months of education or training beyond high school.

Licenses/Certifications/Requirements:

None.

Experience:

Requires a minimum of 4 years experience as a paralegal, legal secretary, or working with trusts and estates performing in a complex administrative role. Strong oral and written communication skills and excellent attention to detail required. Ability to work independently and as a team member required. Ability to effectively organize oneself, multitask, prioritize assignments, and meet deadlines without compromising quality required.

Leadership:

Responsible for directing and monitoring the work of student and/or temporary workers.

Physical Requirements:

Job is physically comfortable; individual is normally seated and has discretion about walking, standing, etc. May occasionally lift very lightweight objects.

Working Conditions:

Standard working environment with possible minor inconveniences due to occasional noise, crowded working conditions and/or minor heating/cooling or ventilation problems. Near continuous use (>70% of the time) of a video display terminal.

The intent of this classification specification is to provide a representative summary of the types of duties and responsibilities that will be required of positions given this title and shall not be construed as a declaration of the specific duties and responsibilities of any particular position. Employees may be requested to perform job-related tasks other than those specifically presented in this description. The University requires that all University employees whose assigned duties include some involvement with The University of Akron's intercollegiate athletics program, comply with all relevant NCAA Bylaws in performing their work.