



*Last Updated: December 2025*

## **Job Title**

# **Planned Giving Estates Officer (Contract)**

## **Impact Statement**

The Planned Giving Estates Officer manages the estates portfolio of MSF Canada's legacy program, overseeing the administration and status of over 300+ estates to contribute to raising over \$19 million of unrestricted funding. Using their relationship management, negotiation, and compliance skills, the Planned Giving Estates Officer is responsible for building meaningful relationships with executors, lawyers, and professional advisors, as well as devising and implementing a strong stewardship plan to maintain these relationships.

The Planned Giving Estates Officer also manages the administration of complex and contested estates in partnership with our lawyer contacts. The role will require close attention to detail, literacy of legal terms and language, and an interest in learning and continuously improving the systems and processes used to record and store a growing number of estates file.

## **Key Responsibilities**

### **Relationship Management**

Build strong relationships with family and friend executors, as well as lawyers, notaries, and trust officers. Manage these sensitive relationships with tact, empathy and compassion while simultaneously achieving ambitious Fundraising goals.

- Leverage these strong relationships to deal with inevitable delays, conflicts, and estate contestations.
- Working with the Planned Giving Coordinator, build a meaningful, customizable, and memorable stewardship plan for family and friend executors with the goal of thanking them, recognizing the donor's legacy, and leaving a positive impression of MSF.
- Send stewardship pieces to executors in a timely manner and customize the stewardship plan to each individual estate. This includes inviting them to events held by Fundraising or Communications when appropriate and sending condolence cards and thank you letters.
- Strategize ways to engage lawyers, financial advisors, and wealth managers to become champions of MSF and build a stewardship plan for them accordingly.
- Escalate prospects, both lawyers/financial advisors and executors with the potential to become donors to the Planned Giving Officer or Prospect Researcher.

### **Monitoring & Compliance**

- Escalate when executors do not operate with integrity and adhere to donor wishes outlined in the will, applicable laws, regulations, and internal policies. Work with Planned Giving Manager to escalate potential issues and outsource decision making to legal counsel.

- Monitor the status of ongoing contested estates and make recommendations to the Planned Giving Manager taking into consideration reputational risks, return on investment, and MSF's values.
- Identify unresponsive, old, complex, or contested estate files and provide the Planned Giving Manager the necessary background information. When needed, escalate these files to our legal counsel on retainer.
- Manage the relationship with our lawyer on retainer to outsource contested, complex, and extraordinary estate files, and follow up with them periodically to ensure return on investment in legal counsel.
- Coordinate with other charities on shared complex and contested estate issues and build relationships with counterparts at these charities to effectively work together.
- Stay up to date on estate laws and government policy changes regarding planned giving vehicles.
- Ensure data privacy and donor confidentiality is held to highest degree in accordance with GDPR and PIPEDA

### **Estates Management**

- Supervise the day-to-day functioning of the estate's portfolio, administration, projects, and stewardship, ensuring the efficient and effective administration of estates.
- Manage a portfolio of over 300 open estates, keeping track of the status of each one, following up with old, extraordinary, and/or complex estates, and escalating when needed.
- Provide up to date pipeline information regarding future and upcoming gifts from estates to the Planned Giving Manager for the successful achievement of the team's revenue goals.
- Construct and implement systems to improve the estate administration and coding processes to ensure our processes are optimized and efficient and to help manage a growing portfolio.
- Review estate documentation such as accounting and releases to ensure they comply with our guidelines and support our signatories in Finance and the EDO to oversee the timely processing and signature of these documents.
- Conduct routine revenue reporting to the Planned Giving Manager and close tracking of gifts in the pipeline.

### **Other**

- Support the Planned Giving team with marketing initiatives, and event coordination and planning.
- Update the Legacy Giving Handbook routinely to keep it consistently up to date.
- Additional tasks as required.

### **Core Competencies**

- Commitment to MSF's Principles (Level 2) Demonstrates Loyalty, Awareness and Respect for MSF's Values
- Results and Quality Orientation (Level 3) Improves Performance and Sets Ambitious and Realistic Goals
- Planning and Organising (Level 3) Follows Up, Plans Activities and Sets Priorities
- Teamwork and Cooperation (Level 2) Shares Information and Coordinates with Team and/or Others
- Networking and Building Relationships (Level 3)

### **Knowledge and Experience**

- Strong database management skills, specifically in Raiser's Edge
- Strong interpersonal skills, with an ability to build excellent working relationships with donors, colleagues, field workers, and suppliers to attain goals.
- Capacity to work both independently and with a dynamic team in a fast-paced office environment
- Strong computer skills with Microsoft Office Suite applications
- Knowledge of international affairs and humanitarian issues
- Ability to analyze and synthesize complex and sensitive material and use it to make sound decisions on behalf of MSF and well-informed messages to donors.
- Demonstrated professional experience in the fields of fundraising, planned giving or direct marketing, or equivalent related experience.
- Experience in all aspects of donor cultivation (research, writing, follow-up, and stewardship)

- Experience working with donors, foundation staff, and/or board members.
- Excellent oral and written communication skills
- Strong understanding of Anti-Racism and Anti-Oppression practices and ethics through education or lived experience.

### **Education, Certifications and Languages**

- Education or equivalent work experience in fund development, communications, paralegal or legal assistance and records management is an asset.
- Fluent in English and French (oral and written) is essential.

### **Working Conditions**

- Work is generally carried out during the day, Monday to Friday (9:00 a.m. to 5:00 p.m. Eastern Time)
- Flexible work hours and hybrid work model (40% in office per week)
- The office environment is open concept and workspace is shared with colleagues.
- Workstations consist of sit/stand desks, anti-fatigue floor mat, swivel chair, laptop with dock and double monitor, and telephone
- Work requires long hours in front of a computer/laptop screen
- On the road travel for up to 20% based on donor needs
- Interaction with clients/donors and the public at large

### **Job Information**

**Position Level:** Individual Contributor

**Department:** Fundraising / Philanthropy / Planned Giving

**Position Status:** 12-month contract

**Activity Rate:** 100% (37.5 hours/week)

**Location:** Toronto or Montreal (Applicants located elsewhere in Canada are welcome to apply, as remote work will be considered)

**Salary Grade:** Level 14 on the MSF Canada Salary Grid, \$70,676.00 per year (non-negotiable)

**Status:** Must be legally authorized to work in Canada

**Benefits:** Health Spending Account, group insurance, 5% RRSP contributions (no matching required), starting 4 weeks' Vacation/year, annual professional development budget, Employee and Family Assistance Program (EFAP), internal psycho-social resources, and a positive and innovative office culture grounded in our core values of humanity, integrity and results.

### **Additional Information**

MSF Canada is a people-focused humanitarian organization that is proud to offer a diverse, collaborative, and inclusive work environment. We strongly believe this approach enhances our work and we're committed to equity in employment. The organization seeks to attract and engage the best professionals to join and maintain meaningful, productive, and lasting work relationships. We embrace diverse motivations and backgrounds of people working together to exhibit their passion in action for the social mission of MSF.

MSF Canada acknowledges the existence of systemic racism and oppression and is committed to sustaining and strengthening its anti-racism and anti-oppression (AOAR) efforts. As MSF Canada continues to grow and strive to remove barriers in its offices in Canada and in MSF work environments abroad, we welcome applications from

individuals with unique experiences of intersectional oppression on the basis of their social markers such as their ethno-racial identity, age, gender identity, education, socio-economic status or place of origin. We encourage Black, Indigenous, People of Colour, LGBTQIA2S+ people, individuals living with disabilities and any individual deserving equity to apply.

In line with MSF's December 2021 pledge to reduce our carbon emissions by 50% by 2030, compared to our 2019 baseline, we encourage everyone to embrace and embed sustainable and climate-friendly practices. Applying a climate and planetary health lens will help us improve our operational impact. Facing climate change and environmental degradation through our operational activities by focusing on mitigation and adaptation will decrease our dependency on fossil fuels, reduce our ecological footprint and help protect human health. Everyone, at all levels, with all skill sets is needed to address the global threat of climate change.