

Bequests Officer

As the Bequests Officer, it's my role to coordinate Estates to secure Bequest income to Caritas Australia (CA). It is also my responsibility to provide administrative support to the Engagement and Sustainability team when required.

I am a member of:

Fundraising team

I report to:

Manager, Philanthropy

My role is based in:

Alexandria, Sydney

My role is classified:

SCHADS Level 3



[Currently Vacant]

I am committed to:

- the mission of Caritas Australia in our quest to end poverty and injustice through the realisation of human dignity for all people
- the principles of Catholic Social Teaching which underpin our work, such as dignity of the human person and the common good
- our Code of Conduct which outlines the professional behaviour that is expected of me
- the safeguarding of children and vulnerable adults in line with laws, standards and Caritas Australia's policies and procedures

In my role, I am accountable for:

- In collaboration with the Philanthropy team, contributing to the development and implementation of a comprehensive Gifts in Wills Strategy which will achieve annual team objectives.
- Coordinating CA administration relating to deceased estates.
- Ensuring documentation such as probate and financial statements from realised estates are received in accordance with legislation and filed accordingly and accurately.
- Preparation and execution of affidavits as required for deceased estates.
- Stewardship of key stakeholder relationships including trustees, legal and financial professionals and estate executors.
- Assist in the development of a stewardship recognition program thanking Supporters/Donors for their gifts and retaining Supporter engagement once a bequest is made.
- Assisting with the development and roll out of key stakeholder engagement events and campaigns.
- Reporting on income received from deceased estates.
- Organising, arranging and coordinating Engagement and Sustainability Management meetings.
- Taking notes and minutes in Engagement and Sustainability meetings.
- Assist the Head of Engagement and Sustainability with general administrative tasks.

For this role I need these skills and experience:

- Administration experience in a similar role. An understanding of bequest administration is preferable.
- Strong organisational, written and verbal communication skills with an eye for detail.
- Demonstrated ability to communicate with sensitivity to people of all ages, financial and social backgrounds in a variety of settings.
- Proficiency with Donor/customer databases (Salesforce preferred) and Microsoft Office with demonstrated attention to detail applicable to documentation, record-keeping and planning.

- High ethical standards in dealing with sensitive financial and confidential matters.

In my role, I will interact primarily with:

- Manager, Philanthropy – to keep informed on work in progress, receive guidance and to escalate issues as required.
- Philanthropy Team – to ensure an integrated approach.
- Fundraising group – to integrate and leverage other Fundraising activities as appropriate.
- Community Engagement – to encourage Diocesan Directors to promote bequests in their parishes.
- Data & Insights Analyst – to identify external research sources and establish compliance and reporting.
- Bequest Benefactors – to build a strong relationship and maintain a connection to Caritas for each donor.
- Solicitors – to build a strong relationship and maintain a connection to Caritas for those advising donors who are considering leaving a gift to Caritas.
- Estate Executors – to build a strong relationship and maintain a connection to Caritas for the executors of estates which have left a gift to Caritas.

For this role I am required to have:

1. Working with Children Check (if applicable)
2. Police check
3. Counter terrorism clearance