



JOB DESCRIPTION

Legacy and Major Gifts Officer

Department: Jewish Community Foundation

Reports to: Executive Director

FLSA Status: Exempt

Work Status: Full time

Salary Range: \$120,000 + annually, commensurate with experience

Position Summary:

The Milwaukee Jewish Federation seeks a passionate and experienced Legacy and Major Gifts Officer to build long-term financial strength for the Jewish community. This role is responsible for cultivating and securing both immediate and future (legacy) philanthropic gifts from individuals, families, and advisors. The successful candidate will be a strategic relationship-builder, with expertise in major gift solicitation, legacy planning, and donor stewardship, aligning donor passions with community priorities.

Key Responsibilities:

- *Donor Cultivation & Stewardship*
 - Identify, cultivate, solicit, and steward individuals for major and legacy/planned gifts, including bequests, life-income gifts, donor-advised funds (DAFs), endowments, and other charitable instruments.
 - Maintain a dynamic portfolio of giving prospects and current donors, ensuring meaningful engagement and stewardship.
 - Conduct personal meetings and calls to discuss philanthropic goals, gift planning opportunities, and legacy commitments.
 - Design individualized donor strategies and collaborate with leadership and lay partners on solicitations.
 - Facilitate multi-generational engagement to foster long-term giving relationships.

- *Program Development & Strategy*
 - Design and implement strategic initiatives to expand participation in legacy giving, including oversight of community-wide programs like Life & Legacy or Create a Jewish Legacy.
 - Collaborate with leadership to set measurable goals for planned and major giving growth and society engagement.
 - Collaborate with internal teams to integrate major and legacy giving across fundraising campaigns and community partnerships.
 - Collaborate with marketing and communications team to develop compelling outreach materials and promote major and legacy giving across platforms, including websites and publications.
 - Serve as a liaison to community agencies, synagogues, and partner organizations to support their legacy initiatives.

- *Professional Advisor Engagement*
 - Develop relationships with estate planning attorneys, accountants, and financial advisors to promote philanthropic planning within the Jewish community.
 - Facilitate educational seminars and materials for professional advisors on charitable giving strategies and vehicles.

- *Administration & Reporting*
 - Ensure accurate documentation of donor conversations and commitments in the CRM database.
 - Track and report on progress toward goals; provide regular updates to leadership and lay committees.
 - Coordinate with legal and finance teams to manage gift agreements and ensure proper administration of planned gifts.

Qualifications:

- Bachelor's degree required; advanced degree, JD or CFRE/planned giving certification preferred.
- Minimum 5 years of experience in nonprofit fundraising, including planned giving and major gifts, or commensurate experience.
- Demonstrated success in securing 5- and 6-figure gifts and/or legacy commitments.
- Proven ability to build trusted relationships with donors, lay leaders, and professional advisors.
- Solid understanding of estate planning, tax implications of charitable giving, and gift planning vehicles highly valued
- Exceptional interpersonal, communication, and relationship-building skills.
- Detail-oriented with strong project management and organizational abilities.
- Familiarity with Jewish communal values, culture, and traditions strongly desired.

Preferred Experience:

- Experience in a Jewish communal fundraising or community foundation environment.
- Familiarity with collaborative fundraising models like Life & Legacy or Create a Jewish Legacy.
- Understanding of donor advised funds, endowment funds, and other philanthropic vehicles used in Jewish community foundations.

Hours and Benefits:

This is a full-time position requiring a minimum of 38 hours per week. Typical office hours are Monday- Thursday, 8 am-5 pm, and Friday, 8 am-3 pm. This work is majority in-person, with a remote option available 1-2 days per week. Occasional evening and weekend hours may be required.

This position is eligible for 20 vacation days and 7 personal days annually. In addition, MJF observes 7 federal holidays as well as Jewish holidays that prohibit work, typically adding between 11 -17 additional paid days off annually depending on the Hebrew calendar. Other benefits include medical, dental and vision insurance, employee assistance program, paid parental leave, health savings and flexible spending accounts, short- and long-term disability, life insurance, and 401K plan.

Work Environment & Physical Demands:

This position operates in a professional office environment with pleasant working conditions, good lighting and ventilation and moderate noise level.

This role frequently uses standard office equipment. There will be frequent computer usage which will require arm and hand dexterity as well as all vision abilities to be successful. This is primarily a sedentary role, however occasional filing and transport of meeting or event materials will be required. This would require the ability to lift and/or move up to 15-20 pounds, usually waist high.

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required to perform the job. Duties, responsibilities, and activities may change at any time with or without notice.

How To Apply:

Please submit your cover letter and resume to HR@milwaukeejewish.org

About the Organization:

Through the development of community-wide financial support, planning and allocations, the mission of the Milwaukee Jewish Federation is to care for the needs of the Jewish people and to build a vibrant Jewish community in Milwaukee, in Israel and around the world. Learn more about the Milwaukee Jewish Federation at milwaukeejewish.org.

Equal Employment Opportunity:

The Milwaukee Jewish Federation provides equal employment opportunities to all employees and applicants for employment without regard to race, color, religion, gender, sexual orientation, gender identity, national origin, age, disability, genetic information, marital status, amnesty, or status as a covered veteran in accordance with applicable federal, state and local laws.