BARNABAS®
FOUNDATION
growing generosity

Estate Planner

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TALENT SOLUTIONS

Barnabas Foundation

Growing Generosity

Mission: To provide guidance and assistance to Christians of all ages and generations to help them grow in their understanding of biblical stewardship and experience the joy of living a generous life.

History

Since 1976, Barnabas Foundation has been advancing God's kingdom by providing quality planned giving and charitable estate planning services, which enable caring Christians to strengthen support for the ministries of Barnabas Foundations' nearly 200 member organizations. Barnabas Foundation offers Planned Gift development and stewardship education for member organizations and churches and helps Christians make tax-wise decisions about their financial resources.

Services

Due to the support from member organizations, Barnabas Foundation is able to provide estate planning information to organizations and individuals at no charge. While many people have given to Christian organizations throughout their lifetimes, they want to make sure part of their estate will continue to support these causes upon their death, rather than allowing their charitable giving to end. Barnabas Foundation seeks to simplify the details about the different approaches to charitable giving, offer Christian estate planning, and help individuals achieve their charitable estate planning goals. They do this through a variety of services, such as:

- Estate and Gift Planning
- Charitable Gift Management and Administration
- Stewardship Education and Development

Estate Planner

Overview

This role serves the charitable estate planning needs of Barnabas Foundation member organizations and their networks of financial supporters in the Western region of the U.S., concentrated in California, Washington, Arizona, Colorado, Texas. As a key member of a national team of Estate Planners, this Estate Planner will hold a current California law license and the desired base of operations would be a West Coast location close to a major airport. California preferred.

The Estate Planner's primary responsibility is to help successful and generous families exercise good stewardship over the resources God has entrusted to them. Experience for the ideal candidate will include many of the following:

Estate Planning and Trust Preparation
Probate Administration
Philanthropic Planning
Multi-generational Wealth Transfer

Strategic Tax Planning for Family Businesses
Living Trusts and Wills
Estate Planning for Special Needs
Business Succession Planning

Responsibilities

The Estate Planner will hold the following responsibilities:

- Meet with individuals to assist them in the development of a plan that provides for their families and the charitable causes close to their hearts. Planning may include discussions and information about estate plans as well as life income agreements and other Planned Gifts.
- Maintain regular contact with member organizations and their fundraising staff.
- Work cooperatively with donors' other professionals including attorneys, accountants and financial planners.
- Speak at member and church events, including board meetings, council/consistory meetings, donor events, adult education classes and seminars.
- Engage in professional continuing legal education on an annual basis.
- Assist the Director of Marketing and Communications with the development and review of Planned Giving marketing materials.

- Will NOT be responsible for drafting any legal documents or providing legal counsel to individual donors.

Key Candidate Characteristics

- Personal motivation in this role will come from a sense of God's calling to serve this unique population.
- Mature spiritual discipleship that aids in working with motivated families to help design generosity strategies for the assets God has placed under their stewardship.
- Ability to convey complex ideas and technical details in a confident, but engaging manner. Mix of up-to-date-expertise and trusted advisor warmth.
- Energized by meeting new clients and sharing creative, customized solutions to increase Kingdom impact.
- Planning and scheduling attention to detail- maximizer of time and resources.
- Happy road warrior that enjoys being out of the office and in the businesses and homes of those who most need their help and guidance.

Requirements

- A Juris Doctor degree and a passion for helping Christians recognize God's ownership of everything and the importance of handling what is entrusted to them in a manner that honors God.
- Experience in the field of estate and gift taxation, as well as familiarity with the field of charitable Planned Gifts.
- Familiarity with the Reformed community and beliefs.
- Excellent writing ability and verbal communication skills.
- Ability to speak in public.
- Good analytical skills.
- Familiarity with standard computer software.
- Willingness to travel for client meetings, seminars, and additional engagements both during the day and evenings. Approximately 30-35% of time may be spent in travel.

For more information, or to apply for this position, please contact
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