

## **JOB DESCRIPTION** **Estate Planner**

### PURPOSE

The Estate Planner's primary responsibility is to support the work of Barnabas Foundation by meeting with clients referred to the foundation by its member charities, churches and other professionals.

### KEY RESPONSIBILITIES

1. Meet with individuals to assist them in the development of charitable plans that both honor God and provide for family needs through their estates, business succession plans, or other wealth transfer events.
2. Follow up with individual clients, their professional advisors, or member charities as appropriate so that charitable plans are completed, reviewed, and updated as needed.
3. Maintain regular contact with member charities and other professionals including attorneys, accountants and financial planners to facilitate effective referral relationships.
4. Speak at events, including board meetings, donor events, adult education classes and seminars.
5. Engage in professional continuing legal education on an annual basis in order to provide clients with the highest quality planning assistance.
6. Other activities as needed to increase the effectiveness of Barnabas Foundation.

### QUALIFICATIONS

The qualifications of the successful candidate for this position include:

1. A Juris Doctorate 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.
2. Experience in the field of trusts and estates, taxation, closely-held businesses, and/or real estate law, as well as familiarity with the field of charitable planned giving is preferred.
3. A committed follower of Christ, familiar with Reformed theology and beliefs.

4. Excellent writing ability and verbal communication skills.
5. Ability to speak in public.
6. Good analytical skills.
7. Familiarity with using Microsoft Office and CRM database programs.
8. 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.

REPORTS TO: Executive Director

BASED AT: Barnabas Foundation offices, Crete, IL