

ROLE PURPOSE



Role Title: Estates and Relationship Specialist

Division: Public Affairs

Location: Sydney, Australia

Date: November, 2024

Employment type: Full time, fixed term (12 months contract)

Reports to: Head of Bequests

Number of direct reports: None

Leadership Band: Leads Self

Purpose of the role:

The Estates and Relationship Specialist is accountable for all of the communication with solicitors and executors, collecting documents, managing any legal or administrative complexity, and ensuring The Fred Hollows Foundation receives their bequest as fully and quickly as possible. Furthermore, the Estates and Relationship Specialist will also liaise with members of the public and solicitors drawing up Wills advising on how best to structure a bequest to The Fred Hollows Foundation to achieve a legacy that aligns with the person/ donor and The Foundation's strategic goals. The role manages correspondence with solicitors, executors, family members and internal stakeholders around simple and complex estate matters.

The Estates and Relationship Specialist will own the outcomes of:

- Sound understanding of the various state and territory estate laws to ensure efficient and effective communication and process around the estate administration and complex estate matters.
- Professional liaison with executors and solicitors to build positive relationships and ensure timely distribution of gifts through efficient co-ordination and administration of estates.
- Assessing and briefing the General Counsel and Head of Bequest incl risks around potential family provision claims and other estate issues.
- Leading in contested estate matters where a group of charities are involved to ensure The Foundation's and aligned charity partners' interests are represented by guiding and leading more inexperienced organisations through the process.
- Advise on new family provision claims and other legal issues including associated risks for The Foundation and work closely with the Head of Bequests and the General Counsel to resolve matters with a commercial mindset.
- Working with donors, members of the general public and solicitors to structure bequests that are aligned with The Foundations' strategic goals, providing relevant information and if required, guiding them through the process of leaving a gift in their Will to The Foundation.
- Responsible for the review of and lead the implementation of a bequest recognition program, honoring legators and their families.
- Working closely with our agency, Ord Minnett to facilitate the transfer assets (ie shares etc) into The Foundation's name.
- Overseeing the archiving process of estate records with the assistance of volunteers in line with the Foundation's policy.
- Maintain accurate and detailed records of communications around the progress of the administration of estates as well as donor and their preferences on the donor database as well as communication.
- Assist with the projecting of bequest income by advising on any delays or pending family provision claims.
- Managing Bequest Assist which will manage the overflow of estates and the respective estate administration on behalf of The Foundation and the bequest team.
- Other tasks as requested by your manager.

Our Capabilities:

As a member of The Foundation Family you will:

1. Live by the values of The Foundation and support The Foundation's culture, performance and brand.
2. Adhere to all The Foundation's policies and procedures.
3. Strengthen the health, safety and well-being of all/look out for the well-being.
4. Lead, collaborate and contribute in all interactions.



Essential Experience:

- Proven experience in a similar role or in relationship orientated fundraising
- Proven experience of leading a program and co-developing strategic direction
- Experience in developing engaging and inspirational donor communications
- Proven experience in interpreting data on donor/customer behaviour to inform strategy
- Experience working with marketing/fundraising databases

Skills:

- Excellent written and verbal communications skills with a demonstrated ability to effectively listen, negotiate and show diplomacy
- Ability and willingness to build strong relationships with both internal and external stakeholders
- Excellent organisational and time-management skills, including the ability to work under pressure and meet tight deadlines
- Innovative, analytical and able to interpret data to find solutions and drive strategy

Desirable Experience:

- Experience of working in the NGO sector
- Understanding of estate law and bequest giving
- Working knowledge of Raisers Edge

Qualifications:

Relevant tertiary qualifications in marketing, fundraising or a related field

Travel:

Availability to travel domestically

This role purpose defines the broad accountabilities of the positions, which may change based on organisational need. Please refer to the divisional, team and individual work plans for more specific details

The position involves:

This position is recognised as having “Contact with Children” either direct or indirect

Additional Responsibility:

Ensure that the work for which they are responsible is carried out in ways, which safeguard the health and safety of workers.

To work in The Foundation, you will:

- Be eligible to work in Australia and other regions where you will be based
- Undergo background check including criminal records and qualifications check
- Undergo working with children check for positions that are identified as working with children