

**Associate Director Trusts & Estates
Tufts University**

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Posted May 12, 2025, set to expire Dec. 31, 2025

Job Title	Associate Director Trusts & Estates
Department	Advancement Division
Institution	Tufts University Medford, Massachusetts
Date Posted	May 12, 2025
Application Deadline	Open until filled
Position Start Date	Available immediately
Job Categories	Associate/Assistant Director
Academic Field(s)	Legal Development/Institutional Advancement
Job Website	https://jobs.tufts.edu/jobs/21883?lang=en-us&iis=Job+Board&iisn=AcademicKeys
Apply By Email	
Job Description	

Overview

Tufts University Advancement seeks a dynamic, experienced professional to serve as Associate Director of Trusts and Estates.

Tufts University Advancement Division (UA) is a comprehensive development and alumni engagement enterprise with a staff complement of approximately 200 full-time employees. Units within UA include development/fundraising, alumni engagement, stewardship and donor relations, special events, gift processing, research and prospect management, gift planning, corporate and foundation relations, and information systems and management. UA's mission is to build strong relationships with Tufts University's constituents, match donor interests with the University's needs and priorities, and secure the financial resources necessary for Tufts to achieve excellence in teaching, research, and scholarship. UA is strongly committed to serving the academic agenda of the University and creating a

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culture of philanthropy in the extended Tufts community. Integrity, collegiality, diversity, accountability, mutual trust, and respect for the individual, as well as the intentions of our donors, are the values that guide the work of the Division.

The Gift Planning Team

The team is responsible for helping donors maximize their gifts to Tufts and reach their philanthropic goals through financial, estate, and tax planning. The Gift Planning Office works with donors and their advisors to integrate their charitable interests into their estate plans and establish gifts that provide income in return. Examples of such gift vehicles include bequests, gifts of retirement plans and life insurance policies, charitable gift annuities, and charitable remainder unitrusts. In addition, the team works with gifts of complex assets such as real estate, business interests, and art.

What You'll Do

We are seeking a motivated and results-driven individual with experience in estate and life income gift administration, excellent written and oral communications skills, a customer-service orientation, strong organizational skills, and the ability to cultivate collegial and productive relationships with advisors, donors, gift officers, and internal partners across the university.

Reporting to the Senior Director, Gift Planning, the Associate Director of Trusts and Estates is responsible for managing all gifts from estates intended for Tufts University. This position ensures the full, timely, and accurate receipt of all estates, trusts, retirement, and life insurance beneficiary designations, and other estate gifts that are in the process of being distributed to Tufts. This individual serves as the point of contact for the University for all executors, trustees, and other fiduciaries of estates with a gift provision for Tufts. The Associate Director confers with and makes recommendations to UA colleagues, University Counsel, and Finance, as needed, to determine the proper allocation of funds from estates.

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In addition, s/he oversees the administration of a life income gift program comprised of more than 400 individual planned gifts invested by Tufts, working closely with an outside service provider. This position manages the complex process of setting up all new life income gifts and additions to existing gifts that are managed by Tufts once the funding has been received at the University, through to their termination. This involves drafting gift annuity contracts, preparing gift and tax calculations for the donors as well as acknowledgement letters, and recording the gifts at Tufts. The Associate Director of Trusts and Estates handles inquiries from beneficiaries related to the management of their gift annuity or trust. The Associate Director of Trusts and Estates also ensures that Tufts is in compliance with all relevant state regulations regarding the right to issue charitable gift annuities.

This position manages the Assistant Director of Trusts and Estates, who assists with the estate and life income gift program administration. The Assistant Director also manages the growing need for gift planning data/analytics. The Associate Director of Trusts and Estates will oversee the Assistant Director in the creation and maintenance of regular reports detailing estate administration, life income gift activity, and gift planning achievement.

What We're Looking For

Basic Requirements

- 5-7 years of related professional experience in one or more of the following areas: gift planning, law, estate planning, personal trust, or other financial services.
- Bachelor's degree
- Experience reviewing and/or drafting complex financial and legal documents and an understanding of financial and estate planning vehicles.
- Outstanding verbal and written communication skills and ability to explain technical information in layperson's terminology.
- Goal-oriented and adept at prioritizing and managing multiple tasks in a fast-paced environment; excellent organizational skills and attention to detail required.
- Customer service orientation and sensitivity to the confidential nature of financial information is mandatory.

Preferred Qualifications

- Advanced degree/law degree preferred
- Experience managing staff preferred

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Pay Range

Minimum \$94,600.00, Midpoint \$118,250.00, Maximum \$141,900.00

Salary is based on related experience, expertise, and internal equity; generally, new hires can expect pay between the minimum and midpoint of the range.

Contact Information

Please reference Academickeys in your cover letter when applying for or inquiring about this job announcement.

Contact

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