

**BENTLEY**  
UNIVERSITY**Boyden Executive Search Contact**Lisa Vuona | 508.320.6445 | [lvuona@boyden.com](mailto:lvuona@boyden.com)Shaké Sulikyan | 508.410.1811 | [ssulikyan@boyden.com](mailto:ssulikyan@boyden.com)**Position Summary**

The **Director of Gift Planning** reports to the Associate Vice President for Development and leads Bentley University's strategic efforts in gift planning. This role oversees all aspects of gift planning, including life income gifts, deferred gifts, trust and estate administration, and gifts of complex assets. The Director manages a portfolio of donors and prospects, cultivating, soliciting, and stewarding planned and blended gifts while developing innovative strategies to market and promote legacy and asset-based giving.

Serving as a key resource and strategist, the Director advises colleagues and donors on gift acceptance and tax-wise giving strategies including complex assets such as life insurance, real estate, tangible property, and retirement plans. The Director collaborates closely with advancement leadership and frontline staff to design and secure transformational gifts, ensuring Bentley's continued success in philanthropic support.

**Key Responsibilities**

- **Develop and implement a comprehensive gift planning program** with both annual and long-term strategies to cultivate, steward, and grow Bentley's legacy donor pipeline.
- **Manage the university's gift planning program**, including bequests, charitable trusts, gift annuities, insurance, and non-cash gifts.
- **Maintain a portfolio of donors**, qualifying, soliciting, and stewarding planned and outright gifts.
- **Provide strategic guidance and technical expertise** to gift officers, advancement staff, and university leadership on best practices in legacy and asset-based philanthropy.
- **Create and deliver an in-house gift planning curriculum** for colleagues, prospective donors, volunteers, and university leaders.
- **Partner with Advancement Communications** to develop and execute a marketing strategy that increases legacy pipeline and Legacy Society membership, raises awareness of planned giving opportunities, and highlights Bentley's expertise in charitable donations of complex and non-cash gifts, as well as maximizing benefits of IRA QCDs and donor-advised funds.

- **Strengthen donor relationships**, stewarding high-capacity legacy donors and prospects in collaboration with the Donor Relations team.
- **Monitor and evaluate program success**, refining strategies based on performance metrics and ROI analysis.
- **Ensure compliance with gift acceptance policies and best practices**, serving as a leader in developing, maintaining, and adhering to policies related to gift counting and acceptance.
- **Liaise with the Office of General Counsel**, maintaining relationships with external counsel and gift planning asset administrators.
- **Advise Finance and Controller's offices** on administrative and accounting matters related to past, present, and future planned gifts.
- **Manage the gift planning operational budget.**

### Minimum Qualifications

- Bachelor's degree with **8+ years of advancement experience**, including a proven record of closing planned and outright gifts and securing complex asset gifts of \$1M+.
- Demonstrated success in leading a **comprehensive gift planning program**, preferably in higher education or a similarly complex organization.
- Strong strategic, analytical, and critical-thinking skills with a **collaborative and donor-centric approach**.
- Deep understanding of **planned giving vehicles, charitable tax law, and estate planning**.
- Excellent **written and verbal communication skills** with the ability to engage diverse audiences.
- Experience working with **CRM donor databases**, Microsoft 365, and gift planning software.
- Ability to manage multiple priorities with strong **attention to detail and deadlines**.
- Commitment to **diversity, equity, and inclusion** within a values-driven organization.
- Professionalism, discretion, and the ability to maintain **strict confidentiality**.
- Must hold a **valid, unrestricted U.S. driver's license** with an insurable driving record.

### Work Environment

- Hybrid work environment with both **virtual and in-person meetings**.
- **Travel required (10-20%)**, including day and overnight trips by car, plane, or public transportation.
- Occasional **evening and weekend responsibilities**.

## Boyden Contacts



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## About Boyden

Founded in 1946, Boyden global executive search was the first firm to focus entirely on retained executive search. Others would soon follow, using many of the basic tenets and principles that Sidney Boyden put in place: maintaining a strict code of ethics and standards; establishing a global presence; creating uniform processes; and working with highly experienced business partners. These aspects of Sidney Boyden's vision are still in use today.

Boyden continues to be a leader in the executive search industry. Through the ever-expanding use of cutting-edge technology, while always adhering to strict ethical standards, we remain true to our rich heritage as the founders of retained executive search. We cover the globe with over 70 offices in more than 40 countries, led by resident professionals adept at working in a global economy. We are poised to help our clients find the people who will lead them today and into the future. In addition to retained executive search, Boyden works with clients seeking advice regarding their Boards. We also assist clients with interim management and leadership assessment.

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