

Trust and Estate Administration Specialist

University of California, Davis

Submit application: <http://tinyurl.com/yksru44k> or hr.ucdavis.edu (Job ID 60812)

DEPARTMENT DESCRIPTION

Development and Alumni Relations provides leadership in building enduring public trust, understanding, and support for UC Davis and its mission of teaching, research, and public service. DEVAR manages fundraising campaigns for the central campus, alumni services, and other opportunities of engagement for UC Davis friends, retirees, students, and volunteer leaders.

As part of the Division of Development and Alumni Relations (DEVAR), the University Development Office (UDev) provides leadership, support, and coordination and services to help build philanthropic support for UC Davis' research, teaching, and service mission and its related fundraising priorities to meet its goals.

JOB SUMMARY

Under the general direction of the Executive Director and Counsel for Planned Gift Administration, the Trust and Estate Administration Specialist provides experienced, high-level programmatic, analytical, technical, and administrative services for the Office of Planned Giving. Actively manage the estates in administration program for UC Davis (Davis and Sacramento campuses). Partners with and assists campus-wide and system-wide colleagues, including the chancellor, provost, deans, faculty, and staff, and interacts with university agents, UC Davis Foundation trustees, alumni, business and community leaders, private foundation officers, attorneys, accountants, financial advisors, donors, executors, trustees, surviving family members, and others in carrying out the responsibilities of the position. Provide critical support including project management and analytical and administration expertise to the planned giving program. Ensures a high level of effectiveness and service that is consistent with University Development goals and works in concert with stakeholders at multiple levels. This position requires excellent communication across all levels of the organization that is collegial, collaborative, and in alignment with the UC Davis Principles of Community.

The incumbent will serve as the pillar lead and project manager for the UC Davis Trust and Estate Administration Program utilizing legal, financial, and technical knowledge to assist in the proper fiduciary management and administration of all estate gifts to the University. As a member of the Planned Giving Team, this position engages with the group in supporting the unit's overall goals. Each team member will have primary functional responsibilities, while serving as backup to other members as needed; duties may include work in the bequest expectancy gift portfolio or real estate and split income gifts portfolio during periods of significant workload or absence.

POSITION INFORMATION

Apply by Date	2/12/2024
Salary Range	Department budgeted salary range: \$90,000/yr. - \$100,000/yr. commensurate with experience.)
Appointment Type	Career
Number of Positions	1
Percentage of Time	100%
Shift Hours	Manager will advise.
Location	Davis, CA / Eligible for Hybrid Schedule
Union Representation	No
Benefits Eligible	Yes

MINIMUM QUALIFICATIONS

Minimum Education/Experience:

- Experience in the legal profession including demonstrated skills in reviewing or preparing complex legal documents (i.e., revocable, and irrevocable trusts, wills, estate plans, beneficiary designations, trust accountings, probate pleadings etc.)
- Experience with processes of probate, trust administration, and beneficiary claims and proficiency with the related legal terminology.
- Strong planning and organizational experience to determine competing workload priorities and skill to meet deadlines, goals, and objectives; flexibility to shift priorities as urgency dictates; experience to work with a high degree of autonomy using sound judgment and troubleshoot issues and situations; and ability to initiate and follow through on tasks despite heavy workloads, frequent interruptions, and/or distractions.
- Computer-related experience to utilize word processing, calendar, email, spreadsheet, database, and presentation software.
- Experience in reviewing, comprehending, interpreting, and applying complex University policies and procedures, informational materials, legal documents and a variety of different tax codes, revenue procedures, court cases and statutory regulations and laws relating to trust and estate administration.

Minimum Knowledge, Skills, and Abilities (KSA):

- Advanced interpersonal, oral, and written communication skills to effectively interact with external (i.e. professional advisors and donor representatives) and internal constituents to meet

their needs in a responsive and professional manner, as well as to prepare a variety of correspondence, reports, and agreements related to probate and trust administration.

PREFERRED QUALIFICATIONS

Preferred License/Certification:

- California Paralegal Certification
- Notary Public or ability to successfully obtain within 6 months.

Preferred Knowledge, Skills, and Abilities (KSA):

- Knowledge and skills to collect information, perform research and related activities for the evaluation required to accept and dispose of gifts of real property.
- Awareness, knowledge, and skill in applying diversity, equity, and inclusion to one's work. A profound belief in the value of a diverse and safe workforce and a commitment to achieve this goal through collaboration and team building, working cooperatively with a diverse group of department and campus constituencies.

SPECIAL REQUIREMENTS

Background Check

This position is a critical position and subject to a background check. Employment is contingent upon successful completion of background investigation including criminal history and identity checks.

Diversity, Equity, Inclusion and Belonging

At UC Davis, we're solving life's most urgent challenges to bring a fuller, healthier, and more resilient world within reach. We grow from every challenge we take on and we don't just maintain - we improve.

We recognize that creating an inclusive and intellectually vibrant organization means understanding and valuing both our individual differences and our common ground. The most comprehensive solutions come from the most diverse minds, and you belong here.

As you consider joining UC Davis, please explore our [Principles of Community](#), our [Clinical Strategic Plan](#) and [strategic vision](#) for research and education, and our latest efforts to [outgrow the expected](#).

The [University of California is an Equal Opportunity/Affirmative Action Employer](#) advancing inclusive excellence. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, age, protected veteran status, or other protected categories covered by the UC nondiscrimination policy.