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## Auburn University Job Description

Job Title: **Estate Administrator**

Job Family: No Family

Job Code: **OA53**

Grade UA07 \$51,900 - \$88,200

FLSA status: Exempt

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### Job Summary

Reporting to the Senior Director of Gift Planning, the Estate Administrator works with executors of estates or trustees of trusts, or any other third party representatives holding assets, to manage and collect the assets due to the Auburn University Foundation and/or Auburn University. Works with highly technical estate planning professionals (attorneys, accountants, financial advisors, executors, and insurance professionals), inside and outside of the University, to ensure that inter vivos and testamentary gifts given to the university and foundation are fulfilled according to the intent of the donor. Additionally, the Estate Administrator manages charitable gift annuity state registration in coordination with the Insurance Commissioner of each state, manages income distribution and taxation issues for trusts held by the Foundation, and coordinates estate litigation with either the general counsel of the university or the foundation legal counsel.

### Essential Functions

1. Administers the estate administration program for the Office of Gift Planning to ensure that the Auburn University Foundation, Auburn University, and other connected entities optimizing the donor's assets and interest with the needed outcomes of the University.
  2. Works with legal, financial, and accounting professionals to secure funds promised to the foundation through a donor's will, trust, retirement account, real estate, or other type of estate gift.
  3. Evaluates the legal documents and communicates with the legal representative of the estate to outline expectations.
  4. Conducts estate accounting audits for compliance to legal documents and excessive charges and fees. Researches title and ownership of properties and compiles tax documents and other public records to surmise a valuation of property. Utilizes industry standard software (PG Calc) to calculate and manage tax deduction values, present values for complicated gift annuities and charitable trusts, and life expectancies. Advises foundation general counsel and university general counsel of estate and probate cases that are problematic and that may lead to formal litigation. Collaborates with Development Accounting to ensure audit compliance.
  5. Maintains compliance with charitable gift annuity state registration through each state's insurance rules and regulations for the issuance of gift annuities by reviewing legal standards, evaluating existing practices for compliance, and recommending changes to departmental supervisor.
  6. Creates gift annuity contracts for development officers, calculates tax deductions/present value related to deferred gifts, and life expectancy calculations for tracking data points related to planned gifts. Reviews and manages third party tax filings for charitable remainder trusts and reviews tax statements for charitable gift annuities, in coordination with AU endowment-investment analysts. Ensures efficient and timely transfer of funds for newly created trustee gift plans. Evaluates strengths and weaknesses within trustee assets portfolio.
  7. Records planned gift and estate administration activities in the Foundation-approved donor management system. Develops & generates regular and special request reports for the department, and engages in other activities as needed to ensure quality control of planned giving data reported in other systems. Utilize the donor management system to identify new prospects for the planned giving officers. Analyzes trends in planned giving related data and reports.
  8. Advertises, interviews, hires, trains, and supervises student workers/interns to produce efficient
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administrative support from student workers. Coordinates training for the department's new employees and TES workers. Educates Development employees about standard estate collection activities via creation and implementation of a best practices guide for estate administration.

9. Preparation of budget reconciliations and reports for departmental personnel using Banner and self service tools. Creates annual budget planning documents based on past expenses and future planned projects, subject to approval by Senior Director of Gift Planning. Coordinates review of legal expenses and reports Recommends cost saving opportunities and informs Senior Director of potential compliance issues with AU or Foundation policy.

## **Supervisory Responsibility**

May be responsible for training, assisting or assigning tasks to others. May provide input to performance reviews of other employees.

*The above essential functions are representative of major duties of positions in this job classification. Specific duties and responsibilities may vary based upon departmental needs. Other duties may be assigned similar to the above consistent with the knowledge, skills and abilities required for the job. Not all of the duties may be assigned to a position.*



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### Minimum Required Education and Experience

	<u>Minimum</u>	<u>Focus of Education/Experience</u>
<b>Education</b>	Four-year college degree	Degree in Financial and Estate Planning, or Accounting. Juris Doctorate desired.
<b>Experience (yrs.)</b>	5	Experience in prior planned giving, estate administration and/or planning, and/or probate related responsibilities within a law firm, probate office, trust department, or accounting firm working in the estate administration area.

#### **Substitutions allowed for Education:**

Indicated education is required; no substitutions allowed.

#### **Substitutions allowed for Experience:**

Indicated experience is required; no substitutions allowed.

#### **Minimum Required Knowledge**

Knowledge of probate process, estate and gift planning, income tax, estate tax, gift tax, trust accounting and administration, non-profit accounting, and legal implications of various actions.

Understand principles of legal, accounting, financial planning and investments, and insurance rules and regulations.

Knowledge of estate planning, probate process, probated and non-probated assets, inheritance language, normal and customary fee structures, chain of ownership, ability to utilize and navigate county GIS, tax records, and deeds.

Ability to decipher legal language in estate planning documents such as wills, trusts, and other deferred gift instruments.

Understanding of the tax code and how it relates to income, estate and gift taxes is required.

Understanding of accounting and accounting principles related to charitable estate gifts and planned gifts is essential as this position plays a critical role in ensuring audit compliance.

Ability to analyze complex income, estate, and gift tax (IRS) rules and regulations, in addition to legal and analysis skills to navigate a complex web of requirements for accounting, collecting and possibly litigating estate issues.

Strong verbal and written communication skills and the ability to adapt to communicating with a high level CEO or legal advisor to having to communicate with an elderly donor who has vision and hearing limitations.

#### **Certification or Licensure Requirements**

Professional financial planning certification (i.e., CFP), or professional certification as an accountant (i.e., CPA) preferred.

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### Physical Requirements/ADA

Occasional and/or light lifting required. Limited exposure to elements such as heat, cold, noise, dust,

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dirt, chemicals, etc., but none to the point of being disagreeable. May involve minor safety hazards where likely result would be cuts, bruises, etc.

Externally imposed deadlines; set and revised beyond one's control; interruptions influence priorities; difficult to anticipate nature or volume of work with certainty beyond a few days; meeting of deadlines and coordination of unrelated activities are key to position; may involve conflict-resolution or similar interactions involving emotional issues or stress on a regular basis.

Job frequently requires sitting, reaching, talking, hearing, handling objects with hands, .

Job occasionally requires standing, walking, stooping/kneeling/crouching/crawling, and lifting up to 50 pounds.

Date: 3/11/2021

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