



Phillips Academy  
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#### Coordinator, Gift Planning

The Coordinator provides administrative assistance for the Director and Associate Director of Gift Planning, and the Development team in general. The Coordinator will support all activities involved with the directors' administrative, prospect management, travel, and data needs, as required to achieve their individual and team goals. The ideal candidate will have some experience in financial, estate planning and/or investment administrative work as the position will involve daily work with wills and trusts, the gift recording/reporting of these arrangements, and support with the stewardship and administration of these gifts.

The Office of Academy Resources is a collaborative and dynamic work environment. The team is mission-driven and aligned with the goals of Phillips Academy, and the success of our community is always clearly in mind.

The successful candidate will have experience with financial and/or legal terms, perhaps with a background in estate administration, complex assets or investment administration, while also enjoying contact with diverse audiences, from alumni/ae and family members of varying ages and backgrounds to attorneys and advisors, largely by telephone and email. A self-starter's confidence with juggling projects on various timelines, learning new databases and software systems; respect for the confidential nature of the individuals' financial and personal resources and giving aspirations. A history of self-motivation that shows the ability to prioritize and take initiative on projects and one's own training.

A Bachelor's degree is required along with strong computer skills, flexibility, excellent interpersonal skills, project coordination experience, and the ability to work well with all levels of the Academy community. Some night and weekend work is necessary to complete the requirements of the role.

Due to COVID-19, our team members are presently working remotely. Until a return to our on-site office setting is approved by Academy leadership, interviews will be conducted virtually. This position will begin working remotely and we are prepared to discuss your needs during this time. This position is expected to be in the office upon a return to campus.

External and internal applicants, as well as position incumbents who become disabled as defined under the Americans With Disabilities Act, must be able to perform the essential job functions (as listed) either unaided or with the assistance of a reasonable accommodation to be determined by management on a case-by-case basis.

Phillips Academy is an equal opportunity employer. Phillips Academy is an intentionally diverse and inclusive residential community "committed to creating an equitable and inclusive school in which students from diverse backgrounds, cultures, and experiences—including race, ethnicity, nationality, gender, socioeconomic class, sexual orientation, gender identity, religion, and ability—learn and grow together." The ideal candidate supports the inclusive and diverse nature of the community. Any offers of employment will be contingent upon successful CORI/SORI and fingerprinting background checks as well as authorization to work in the United States.