Planned Giving Student Associate Job Description: The Student Associate is responsible for the following duties:

1) **Management of the College's Portfolio of Life Insurance Policies**

   This time-sensitive job requires working with life insurance companies to monitor the status of the college's policies to prevent policies from lapsing. The Associate would be responsible for maintaining a status report, outlining the major policy factors, such as type of policy, verification of ownership and beneficiary, death benefit, cash value, dividend credits, premiums, both projected and guaranteed. Proper management of this portfolio will allow the college to treat its insurance policies more like financial investments and allow the college to convert or sell policies before lapse.

2) **Maintenance of Estate and Bequest Expectancies Records**

   The Associate will work with lawyers and financial institutions in monitoring probate estates. He or she will enter data into a computer program that documents all bequest expectancies and estates that benefit Rhodes. Accuracy in entering data is essential because Rhodes makes financial projections based on the current value of estates in probate and future value of bequest expectancies.

3) **Management of Estates in Probate**

   The Associate will prepare and file appropriate documents with Probate Courts and financial institutions in order to collect funds from probate estates.

4) **Management of Life Income Gifts**

   Proper record of life income gifts, such as charitable remainder trusts and charitable gift annuities, is essential and an important part of the stewardship of deferred or planned gifts. The Associate will follow detailed procedures and prepare financial reports for life income donors.