# JOB DESCRIPTION

**Job Title:** Director, Legal Services and Estate Administration  
**Department/Group:** Legal  
**Location:** 1800 Grant Street, Suite 725  
Denver, CO 80203  
**Reports To:** General Counsel  
**FLSA Status** Exempt  
**Date Prepared** July 2019  

## Job Purpose

Responsible for a variety of duties and tasks relative to contracts, legal correspondence, corporate records and compliance, human resources, and trust administration working directly with general counsel. Provides compliance support to a number of assigned areas by performing critical analysis and reviewing relevance of legal issues (cases, statutes, and regulations); based on this review, makes strategic recommendations on actions and processes to ensure compliance.

## Essential Duties

**A. Provides Support to General Counsel**
- Assists general counsel in a variety of areas: 1) human resources (hiring and termination processes, record keeping, payroll process, and employee relations); 2) contract administration (reviewing, drafting, editing and routing through the closing processing); 3) risk management (maintain relationship with third-party administrators/consultants, completes annual review and renewal of policies, submits claims, pays premiums); 4) departmental office administration (general legal correspondence, completes research and prepares reports and responses, and maintains department records and files).

**B. Life Income Administration**
- Provides administration for planned gifts, including 1) drafting and reviewing documents; 2) preparing gift illustrations for donors and development officers; 3) working with trust administrator to set up, maintain and close life income gifts; 4) working in coordination with Advancement planned giving team; 5) communicating with donors (ABRs, quarterly reports, address changes, etc.), external trustees, personal representatives, attorneys related to internal/external trusts and estate gifts; 6) filing of trust registrations with probate court.

**C. Bequest Administration**
- Manage process for realization of bequests designated to the Foundation and the University: 1) primary contact for fiduciaries and third-party payees, e.g. Fidelity, TIAA, with respect to monies designated to the Foundation/University by deceased donors; 2) review all governing documents and raise issues/concerns when appropriate; 3) prepare documentation required to collect assets from applicable fiduciaries and transfer assets to the appropriate Foundation funds in accordance with donor intent; 4) review fiduciary inventories and accountings and raise issues/concerns when appropriate; 5) track realization of bequests in donor database; and 6) monitor and assist with probate litigation activities as needed.

**D. Board Support**
- Board administration (drafting and processing of board and committee minutes to completion)

**E. Corporate Compliance, Including Charitable Solicitation Laws**
- Monitors statutes and regulations, and files any corresponding state reports to ensure compliance related to employment, charitable solicitation, trust and annuity administration, and corporate activities.

**F. Support to Business Partners**
- Coordinates activities with gift administration, gift planning, and accounting department as necessary.

*Other duties as assigned.*
# Job Specifications

## Knowledge and Skills
- Excellent written and verbal communication skills, including the ability to accurately and thoroughly communicate legal issues and concerns.
- Ability to communicate effectively with internal clients, University partners, donors and their representatives, outside counsel and other support staff.
- Highly organized, responsible and responsive, with strict adherence to deadlines.
- Ability to manage multiple projects with competing priorities and deadlines and completing assignments with a focused attention to detail.
- Self-sufficient, able to work independently and take initiative, but able and willing to ask for assistance and advice when needed.

## Education
Bachelor's Degree Required, paralegal certification or equivalent experience preferred.

## Experience
Minimum of five (5) years’ experience, ten (10) or more years preferred, as a paralegal and/or in combination with legal administration. Experience with trusts and estates required, experience with nonprofit organizations preferred.

## Software Utilized
Microsoft Office Products, including Word, Excel, PowerPoint, Outlook, Adobe Acrobat, fundraising software (PG Calc and donor relationship databases) and legal research tools.

## Supervisory Responsibility
Not currently required for this position.

## Physical Demands and Working Conditions
Works in a normal office environment requiring light physical effort by handling objects up to 20 pounds occasionally and/or up to 10 pounds frequently. Works with standard office equipment (such as phone, fax and personal computer). Ability to navigate stairs frequently during the course of a business day in various work locations. Sitting at desk for most of day, and working with computer.

NOTE: This job description is not intended to be an exhaustive list of all duties, responsibilities or qualifications associated with the job.

Return cover letter and resume via email to:
Kathleen Liljenberg
Director, Legal Services
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