University of Colorado Foundation

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
Date Revised	

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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