



Director, Complex Assets (Legacy)
Pomona College
Claremont, California

THE SEARCH

[Pomona College](#) (Pomona) seeks a talented, self-motivated, and intellectually curious director, complex assets (director). Charged with contributing significant resources to develop and grow a sustainable pipeline of complex gifts with a focus on bequests, trusts, and other deferred or complex giving vehicles, the director has primary responsibility for the strategic growth of the legacy giving program. The director will cultivate and close gifts from alumni, families, donors, and prospects in support of the division's annual and multi-year campaign fundraising goals and will effectively collaborate with the highly regarded Pomona Plan team that is charged with securing life income, primarily from friends of the College.

A primary responsibility for the director is securing new legacy intentions and new members in the College's legacy society Granite & Sagebrush, individually and in collaboration with fundraising colleagues across advancement. The director will manage a portfolio of assigned alumni, families, friends, donors, and prospects to generate interest in and to secure legacy intentions, partnering with directors of development on blended giving opportunities for alumni and families. The director will also manage one complex assets coordinator.

Reporting to the assistant vice president of complex, legacy, and principal gifts, the director will activate and support colleagues in sustained, donor-centric complex assets fundraising for the College's top priorities and campaign initiatives. The director will provide vision and leadership for a comprehensive and well-integrated complex assets fundraising and marketing program for Pomona in support of the most aspirational, comprehensive capital campaign in the history of the College, while also raising the level of giving beyond the campaign.

The director must demonstrate familiarity in building collaborations with other high-performing fundraising teams. This position requires judgment and the ability to act independently to plan and accomplish goals. The successful candidate will be an inspiring leader, good listener, and an effective

advocate for the value of a liberal arts education. The director will actively contribute to a healthy team environment, inspire colleagues toward excellence, and lead by example.

ESSENTIAL FUNCTIONS:

Reporting directly to the assistant vice president of complex, legacy, and principal gifts, the director must work independently and collaboratively to perform the following essential duties and responsibilities:

1. Lead the growth and development of a robust pipeline of significant legacy gifts, ensuring alignment with Pomona College's long-term fundraising strategy and achievement of annual and multi-year campaign goals.
2. Maintain a personal portfolio of high-level donors and prospects, including complex assets and major gifts, and demonstrate frontline fundraising success through identification, cultivation, solicitation, and stewardship. Serve as the College's recognized expert in complex assets, collaborating with senior leadership and donors' financial, tax, and estate advisors to develop and present tailored complex gift strategies.
3. Lead in the creation, design, and execution of Pomona College's complex asset strategies and goals and develop metrics to measure ongoing success and ROI. Achieve personal annual fundraising goals with a focus on legacy giving from alumni, families, donors, and prospects.
4. Recruit and supervise one complex assets coordinator. Develop a comprehensive, metrics-based, fundraising plan and set aspirational goals.
5. Operationalize short and long-term complex assets goals and strategies, with an emphasis on legacy giving, to build upon existing commitments and expand the current donor base of support.
6. Provide complex assets training to frontline fundraisers.
7. Collaborate with and support major gift, life-income gift (Pomona Plan), reunion and family giving fundraisers in cultivating complex assets and legacy gifts from alumni, families, donors, and prospects that may combine major, life-income, complex assets and legacy gifts into their annual planning and strategy sessions.
8. Develop and implement strategies to maximize the acquisition and retention of alumni, families, donors, and complex assets and legacy giving prospects, particularly legacy gift donors.
9. Develop and coordinate annual marketing strategies and materials that promote complex assets and legacy giving, in partnership with the Office of Advancement Communications.
10. In collaboration with the stewardship team, help oversee the stewardship of alumni, families, legacy giving donors, and prospects, strategically increasing membership in the Granite & Sagebrush Society, the College's legacy giving society.
11. Track mature estate expectancies to ensure the preservation and timely distribution of all estate gifts to Pomona College.
12. Build and nurture strong relationships with financial, legal, and tax advisors in support of complex assets and legacy giving to Pomona College.
13. Foster a leadership style that inspires, empowers, and motivates staff while promoting a collaborative and inclusive work environment.
14. Partner, coach, equip and encourage development staff to pursue complex assets gift opportunities, assisting them in the design and implementation of individualized strategies for

the identification, qualification, cultivation, solicitation and stewardship of planned, major and blended gifts as appropriate.

15. Perform other duties as requested, delegated, or assigned.

QUALIFICATIONS:

Education: A Juris Doctor (J.D.) degree and estate planning experience are preferred, or equivalent combination of education and experience, such as a professional designation like Certified Financial Planner (CFP), Certified Public Accountant (CPA), or Certified Specialist in Planned Giving (CSPG).

Experience: The ideal candidate has a minimum of seven years of professional work with clients or donors in the areas of estate or legacy planning. Management experience is preferred. Experience in an academic setting is strongly preferred, as is working in a campaign environment.

REQUIRED KNOWLEDGE AND CRITICAL SKILLS:

This individual must possess the knowledge, skills, and ability to successfully perform the essential functions of the job or must be able to demonstrate how the essential functions will be performed through knowledge, skills, and abilities not listed below.

1. Understand and communicate the mission and history of the College's liberal arts environment.
2. Thorough knowledge of various gift planning options, including bequests, trusts, outright gifts, gifts of securities, insurance, real estate, and other financial vehicles; charitable giving tax laws; and methods and means of planned giving.
3. An understanding of basic investment concepts in addition to familiarity with charitable trust accounting.
4. Have experience in tax, estate, and financial planning and in dealing with and advising donors and prospects.
5. Remain current on tax laws and be willing to learn every day as donors present new issues to be resolved.
6. Experience working in a comprehensive capital campaign, preferably in a higher education setting.
7. A proven track record of success in personally identifying, qualifying, cultivating, soliciting, and stewarding gifts of complex assets or complex giving vehicles from individuals.
8. Comfort and effectiveness in working with high-net-worth individuals; experience in international settings a plus.
9. Demonstrated effectiveness and clarity of verbal and written communication with excellent interpersonal communication skills, cultural competency, and ability to work with, facilitate, motivate, and inspire a diverse group of donors, prospects, colleagues, volunteers, and constituents.
10. Must handle all activities with discretion, tact, and a keen eye for detail.
11. Working knowledge of basic math and statistics.

12. Proficient use of Microsoft Office Suite (such as Word, Excel, Outlook) and customer relationship management software (such as Salesforce).
13. Able to meet multiple deadlines and work both independently and as a collaborative member of advancement and the College in support of the College's strategic vision and the division's annual goals with a high standard of integrity and ethics.

COMPENSATION AND LOCATION

The annual salary for this role is between \$175,000-\$195,000 with a competitive benefits package. The specific factors that Pomona College will consider when offering a salary to an individual will include, but not be limited to, education, training, relevant prior experience, and performance in prior roles.

Pomona College is located in the city of Claremont, CA, 35 miles east of Los Angeles. The city, with a population of more than 36,000, features sidewalk cafes, specialty shops, tree-lined streets, and bungalow homes. Claremont was recently ranked the 5th most-desirable town in the U.S., and housing prices are more affordable than many areas in Southern California. With stunning views of the San Gabriel Mountains, Claremont is less than an hour away from downtown Los Angeles and from mountains, desert, and beaches.

APPLICATIONS, INQUIRIES, AND NOMINATIONS

Screening of complete applications will begin immediately and continue until the completion of the search process. Inquiries, nominations, referrals, and CVs with cover letters should be sent via the Isaacson, Miller website:

<https://www.imsearch.com/open-searches/pomona-college/director-gift-planning-legacy>

Rachel Ellenport, Partner
Maureen Perry, Associate
Rebecca Lyons, Search Coordinator
Isaacson, Miller

Pomona College prides itself in being an open, competitive, and equal opportunity employer.

ADDENDUM

About Pomona College

Pomona College was incorporated in October 1887, by a group of Congregationalists who wanted to recreate “a college of the New England type” on the West Coast. Instruction began the next year in a small, rented house in the city of Pomona. By the 1920s, Pomona President James A. Blaisdell faced a difficult choice—to limit expansion to retain the college’s unique character or allow growth and expand into a university. Under Blaisdell’s guidance, the college chose a third path. Using Oxford and Cambridge as models, Pomona founded a consortium unlike any other in America.

Over the next 75 years, two graduate schools and four other undergraduate colleges joined Pomona as members of The Claremont Colleges, located on neighboring campuses, allowing cross-registration in the nearly 2,700 courses taught across the consortium, and sharing important facilities such as libraries. As such, Pomona offers both the advantages of a small liberal arts college and the resources of a university.

Today, Pomona enjoys a reputation as one of the most highly regarded and selective liberal arts colleges in the world. It also stands with a small number of institutions willing and able to admit students based entirely on academic achievement and promise without regard to ability to pay, and then to meet all demonstrated financial need of domestic students with no loans. Sixty-seven percent of students receive financial aid. Because of this institutional commitment, Pomona attracts some of the most highly qualified students in the country. Through an academically challenging curriculum, outstanding faculty, extraordinary students, and intimate size, Pomona provides an unparalleled environment for intellectual development and personal growth.

Pomona is a close-knit and diverse community of accomplished scholars, scientists, entrepreneurs, and artists who are passionate about making a difference in the world. Pomona provides excellence in undergraduate instruction across 48 majors in the arts, humanities, social sciences, and natural sciences. There are approximately 1,747 students from 61 nations and 49 U.S. states, as well as the District of Columbia, Guam, and Puerto Rico. Over 50 percent of Pomona students self-identify as members of BIPOC communities, and 13.3 percent of the class of 2025 are first-generation students. Almost all students live in one of 14 residence halls on the 140-acre campus.

With a student-faculty ratio of 8 to 1 and an average class size of 15, students work closely with their professors in the classroom, in the lab, and in the field. Pomona offers about 650 courses taught by 198 faculty members, all with terminal degrees. Its location—within an hour of Los Angeles and the mountains, desert, and beaches—provides countless opportunities for field study, research, and internships. About 53 percent of students participate in research with faculty, including more than 200 students who enroll in summer research programs.

Pomona has one of the biggest networks in liberal arts education with alumni working in a wide variety of career fields, from business, law, and medicine to non-profit, education, and science to politics, art, and entertainment. Pomona's 25,000 living alumni are dispersed across all 50 states and 74 countries.

Financial and Advancement Overview

As of June 30, 2024, Pomona's endowment was valued at nearly \$3.0 billion. Historically, endowment distributions funded 49 percent of the college's operating expenses. Although the endowment is large relative to peers, growing the endowment is a necessity given Pomona College's entirely need-blind admission policy in conjunction with its commitment to meet all demonstrated financial need for all domestic students without any loans. Pomona College's total operating budget was over \$214 million for FY 2024 on a net tuition basis.

Pomona College's most recent comprehensive Campaign Pomona: Daring Minds concluded in 2015 with more than \$316 million raised from 28,124 donors. Funding priorities included capital improvements, unrestricted giving, financial aid, and faculty and programmatic support, both outright and endowed.

In FY 2024, total fundraising revenue was \$57 million, with approximately \$5.2 million given to the annual fund, \$10.3 million to major gifts, and \$14.4 million to the Pomona Plan, the first annuity and life income program in the country. For decades, the Pomona Plan has been a steady source of revenue for the college.

LEADERSHIP

Maria Watson

Vice President for Advancement

Maria Watson joined Pomona College in 2020 as Vice President for Advancement. As an Executive Officer of the College and reporting directly to the President, Watson oversees Pomona's development, principal and major gifts, gift planning, alumni and family engagement, advancement services, and advancement communications and office of college events teams. The team of nearly 90 staff raises over \$50 million per year and is currently leading the most ambitious campaign in Pomona's history to support the mission of one of the leading liberal arts colleges in the country.

Watson was previously Associate Vice President for Development at the University of Southern California (USC), where she set strategic direction for major gift, regional, and school/unit fundraising initiatives to realize the university's historic \$7.2 billion campaign, "Fas Regna Trojae." She was promoted to AVP of Development in 2014 after her successful tenure building philanthropic support for the university throughout the Northeast as the inaugural director of USC's New York Advancement office since 2011.

Watson brings 25 years of experience in the non-profit sector in fundraising, marketing, and public relations. Prior to the University of Southern California, she served as the Chief Development Officer for

WFUV Public Radio, Fordham University in New York. During the course of her career, Watson has also held a number of senior positions in management, marketing, and fundraising in performing arts organizations, including Lincoln Center, New World Symphony, and Brooklyn Philharmonic. She spent seven years in marketing, ultimately as Director of Marketing and Communications for The Chamber Music Society of Lincoln Center. Her career began with the National Endowment for the Arts and Congressional Arts Caucus in Washington, DC.

A native New Yorker, Watson earned a bachelor of musical arts degree from the University of Michigan in Ann Arbor on merit scholarship and a master of business administration from the University of Southern California. She and her husband David live in Claremont. An avid motorcyclist, she is a proud Ducatista on the street and track and has taken up the futile pursuit of speeding on a racetrack.

Yasmin Omer

Assistant Vice President of Complex, Legacy, and Principal Gifts

Yasmin Omer joins Pomona College in September 2025 as the inaugural assistant vice president of complex, legacy, and principal gifts. In this newly created position reporting to Maria Watson, vice president for advancement, Omer will build and set the strategic framework and direction for a newly established complex assets and principal gifts operation. Omer will also work closely with the vice president for academic affairs and dean of the college, as well as other senior academic and administrative leaders across campus to generate sustainable levels of philanthropic revenue to support Pomona's bold Strategic Vision and continued academic excellence. Omer will lead a new team responsible for principal gifts, as well as bequests, trusts, and other deferred or complex giving vehicles. She will also collaborate closely with the Pomona Plan team, which leads efforts to secure life income gifts, primarily from friends of the College.

Omer joins Pomona from the University of Chicago (UChicago), where she held progressive leadership roles since 2013. Beginning as director of development for the Library, Omer significantly grew annual fundraising totals for the unit amid a university-wide campaign and worked collaboratively with fellow development leads across the schools and divisions on donor identification and cultivation. In 2019, Omer transitioned to the Division of Social Sciences where she successfully achieved record-breaking fundraising years; built and led a high-performing team of development professionals; and engaged meaningfully with the division's dean and advisory council.

Prior to UChicago, Omer served in major and individual giving roles at New York Public Library, New York University School of Law, and The Jewish Museum. Omer began her fundraising career in progressive development roles at WGBH Educational Foundation in Boston, Massachusetts.

Omer earned a bachelor's degree in political science from McGill University.