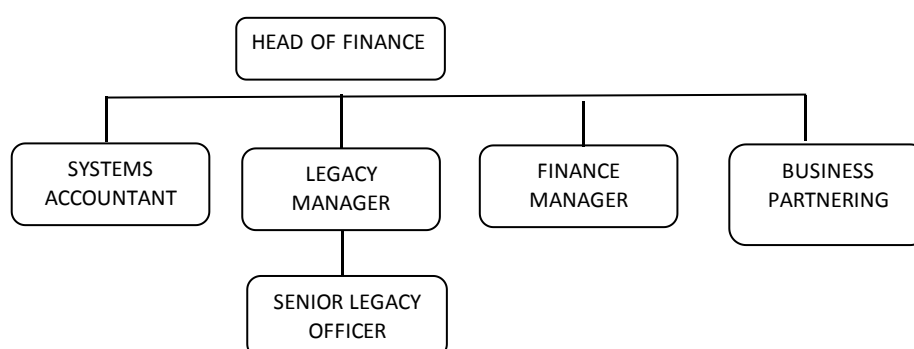


## Senior Legacy Officer

|               |                    |
|---------------|--------------------|
| DIRECTORATE:  | Corporate Services |
| SECTION:      | Finance            |
| REPORTING TO: | Legacy Manager     |
| CONTRACT:     | Permanent          |

## Organisation Chart



## WORKING RELATIONSHIPS:

### Inside Diabetes UK

Regular communication with the finance team and CS Director in producing reports and providing updates.

Occasional contact with the Supporter Care team and monthly updates with Gifts in Wills team.

### Outside Diabetes UK

Frequent contact with solicitors and legacy officers of other charities.

## OVERALL PURPOSE OF THE JOB

You will be responsible for the day-to-day administration of legacies and bequests made to Diabetes UK, including processing notifications, corresponding with executors and scrutinising estate accounts, to ensure that income is maximised and received without delay.

## MAIN DUTIES AND RESPONSIBILITIES:

### Manage legacy files

- Process and record all notifications, legacies and bequests made to Diabetes UK and ensure all appropriate records are maintained

- Manage correspondence with executors, solicitors, co-beneficiaries, banks etc. either with standard-form letters or as appropriate to specific situations
- Review estate accounts received for residuary legacies to ensure the calculations are correct and that the correct treatment for Capital Gains Tax and Inheritance Tax have been adopted
- Develop contacts with legacy officers of other charities to share best practice and work together on common cases
- Refer any matters with substantial financial, ethical or public relations implications, through to Legacy Manager, Head of Finance and the Board of Trustees in line with the Trustee delegations
- Keep management informed of all substantial or contentious cases Check receipt of income with Finance Team and ensuring that sums received are in accordance with information provided

## **Systems & Reporting**

- Provide monthly reconciliation of legacy income and other data for inclusion in monthly management accounts including number of live files and expected future income from live files
- Provide data to Fundraising Team and contracted 3<sup>rd</sup> parties to support forecasting and budgeting
- Provide data on contentious cases to Finance Committee
- Ensure legacy system “First Class” in maintained and used effectively

## **Other**

- Such other duties as may be directed by Legacy Manager and Head of Finance
- Maintain a good working knowledge of the prevailing legal environment over all areas which could be encountered in the role (including distinctions between English and Scottish Law and developments in inheritance and capital gains taxation) through continuing professional education

## **PERSON SPECIFICATION:**

### **The best person for this job will be able to:**

- Demonstrate they hold the Certificate in Charity Legacy Management Administration (CiCLA), have a legal qualification, or that they are qualified by experience
- Use data systems and tools to manipulate and analyse statistical data
- Identify issues/ problems early and take ownership of resolving them
- Create effective processes for self and others to optimise, monitor and evaluate outcomes and results
- Take ownership for delivering high-quality work in a timely and cost-effective manner

### **The best person for this job will have experience in:**

- Legacy administration in a charity or legal team
- Establishing and maintaining effective working relationships with multiple stakeholders (internal and external)
- Communicating effectively and sensitively when dealing with the bereaved
- Conveying complex information and requirements clearly to lay stakeholders
- Developing systems, reporting and performance measures

Desirable

- Working with “First Class” – database to manage Legacies

The best person for this job will be:

- Co-operative and collaborative
- Able to work in a demanding environment, providing accurate and timely information to a high standard
- A continuous learner who learns from the mistakes and successes of self and their peers
- An excellent communicator who uses a broad range of communication styles who chooses appropriate, effective ways to communicate to different audiences in diverse situations
- Resilient and positive, with the ability to respond flexibly to new opportunities
- A forward thinker who is pro-active; anticipating future requirements and planning accordingly
- Actively seeking, implementing and delivering new and innovative approaches from other organisations to improve internal financial services