

A red squirrel is perched on a weathered tree stump, facing right. Its bushy tail is raised and slightly curved. The background is a soft-focus field of purple heather under a bright, hazy sky.

ROLE PROFILE

Legacy Assistant

GROW WITH US



WOODLAND
TRUST



WOODLAND
TRUST

OUR VISION

We're creating a world where woods and trees thrive for people and nature.



RESTORE

We restore the ecological condition of existing native woods and trees, to increase resilience and create conditions for nature and people to thrive.



PROTECT

We protect ancient, veteran and valuable woods and trees, to stop the loss of irreplaceable habitat and carbon stores, preserving the UK's natural heritage.



CREATE

We create quality native woods and get native trees growing to benefit nature, climate and people into the future.



WOODLAND
TRUST

OUR ORGANISATIONAL NATURE

Our Organisational Nature is at the heart of how we work together. It helps us understand what it means to be part of the Woodland Trust and empowers us to make an impact every day. Our people embody these ways of working, inspiring and enabling each of us to play a part in achieving our vision.

A greener, healthier future for our planet starts right here with you.



Grow Together

We are a team that grows together; made up of unique roles and expertise. We communicate effectively, forging partnerships inside and out, building understanding and trust, valuing differences and recognising each other.



Explore

We know exploration is important, it's how we come up with the best ideas. We won't always get it right but learn and share as we go. We are bold about who we are and encourage healthy challenge.



Focus

We create clarity and stay focused, ready to adapt when we need to. We are empowered to take the time to reflect so that we can develop and work smarter.



Make it Count

We need to create a lasting positive impact. We keep the big picture in mind, harnessing passion and inspiring others to connect with us as we aim to make a genuine difference.

JOB DESCRIPTION

Job Title: Legacy Assistant

Job Code: WT1069

Salary: £26,227.50 per annum

Contract: Full-Time

Reports to: Senior Legacy Officer

Department: Philanthropy

Team: Legacy Income Management Team

Location: Hybrid

Our Working from Home (Hybrid working) policy is flexible and the frequency of time spent working between your contracted office and your home will vary across teams and job roles.

WHAT YOU'LL DO

Main purpose of the job

The Legacy Assistant will provide essential administrative and operational support to the Legacy Income Team, ensuring the smooth and efficient handling of legacy notifications, data entry, and financial processes. This entry-level role is designed to support the team's efforts in securing and maximising legacy income, while offering development opportunities for future progression within legacy management.

Key Responsibilities:

- Process incoming legacy notifications, including managing post and emails.
- Open new legacy files and input data accurately into the legacy database (e.g., First Class 4).
- Maintain up-to-date records and ensure legacy files are regularly reviewed and progressed.

WHAT YOU'LL DO

Key Responsibilities:

- Assist with legacy banking, cash records, and weekly income reporting.
- Support the team in preparing financial reports and maintaining data quality.
- Manage a small caseload of pecuniary legacies under supervision.
- Monitor progress and ensure timely receipt of income.
- Respond to queries from solicitors, beneficiaries, and the public via phone and email.
- Escalate complex or sensitive issues to senior team members.
- Support the Legacy Income Manager with reporting and data control.
- Provide administrative support to the team and help with other ad hoc tasks as needed.

WE WANT YOU TO:

GROW TOGETHER

- **Be a leader** – taking responsibility for inspiring, mobilising and supporting others to deliver on our strategic goals.
- **Collaborate with purpose** – collaborating effectively with others where it will add value and result in clear and positive impact.
- **Build relationships** – being approachable and developing positive relationships. Making connections internally and externally to pursue shared goals, expand learning opportunities and grow influence. Help others to connect and nurture positive relationships.
- **Communicate Effectively** – being clear and adapting communication styles to connect with others effectively.

EXPLORE

- **Evolve and continuously improve** – having the courage to question previously held beliefs and seeks out opportunities to continuously improve the way we work
- **Be able to challenge** – showing courage and ability to challenge, be challenged and respond to challenge constructively to enable us to keep improving how we deliver on our strategic goals
- **Reflect and learn** – taking opportunities to reflect, learn and improve.
- **Create meaningful change** – being willing and able to shake things up and bring about change where needed for the good of the cause.

FOCUS

- **Take effective decisions** – balancing considered, evidence-informed decision taking and quick, decisive action depending on the situation
- **Adapt** – being proactive and flexible; able to take on board new information and respond effectively to a changing internal and or external environment.
- **Prioritise for impact** – building plans that have a clear purpose, set of outcomes, monitoring and evaluation and activity that is prioritised based on the impact they will have.

MAKE IT COUNT

- **Deliver results** – getting work done in a way that is environmentally, financially and ethically sustainable, is considerate of people's wellbeing and always considerate of the broader impact.
- **Connect to the bigger picture** – connecting the work we do to our vision and being trusted to deliver what is needed.

PERSON SPECIFICATION

		Essential/Desirable (E/D)	Where
You'll have experience	Use of the Microsoft Packages proficiently in particular (Word, Outlook, Teams, Sharepoint).	E	Application/interview
	Communicating with a wide range of audiences both in written and verbal formats	E	Application/interview
	Applying a strong attention to detail, data entry and record keeping	E	Application/interview
	Prioritising day-to-day tasks and plan to maximise most effective use of time to deliver against deadlines to a high standard	E	Application/interview
	Working as part of a team and being able to build effective relationships with internal stakeholders across departments.	E	Application/interview
	Collaborating and working with colleagues or peers to deliver its objectives efficiently	E	Application/interview
You'll need to know	Some knowledge of the charity sector and/or wills and probate, and if not a willingness to engage in training and learning in legacy administration.	D	Application/interview

PERSON SPECIFICATION

			Essential/Desirable (E/D)	Where
You'll have a desire to	Grow together	Communicate effectively Collaborates and builds relationships	E	Interview
	Explore	Be able to challenge Be able to reflect and learn	E	Interview
	Focus	Adapt Prioritise for impact	E	Interview
	Make it count	Inspire and influence Think strategically and connect to the bigger picture	E	Interview
You'll be subject to	Pre-employment checks including Right to Work and confirmation of employment history (3-years).		E	Onboarding