

Legacy Administration Officer (Finance)



WHO WE ARE

For nearly 5 million people with diabetes in the UK, there's no day off. At Diabetes UK, we fight day in, day out for better care, treatment and support. We won't stop until diabetes can do no harm. With more people than ever living with diabetes and millions more at risk of developing type 2, our work has never been more needed.

We can't do any of this without you. Our staff are passionate and determined about helping everyone affected by diabetes. For over 85 years, they've been behind vital policy changes, as well as new treatments and technologies to make living with diabetes easier every day. But there's more to do. And you can be part of it.

We're a really diverse bunch and we recognise and respect your value as an individual.

As well as helping people with diabetes, you'll be part of one of the top 30 Best

UK Charities to Work For, and one of the top 75 Best Large Companies in London.

Tackling inequality is part of our mission, and we're committed to being a diverse and inclusive organisation, for all of our people and volunteers. We have a friendly and inclusive culture, with a range of staff networks and ways to get involved. You can find out more about our approach to equity, diversity and inclusion in our strategy here [EDI Strategy Branded version 22 March 2023.pdf](#).

Our vision is a world where diabetes can do no harm. Join us today, and together, we can make that a reality.



JOB DESCRIPTION

Role title: Legacy Administration Officer

Contract type: FTC (18 months)

Hours: Full Time

Band: Band 7

Key relationships (internal and external):

Inside Diabetes UK: Working within the legacy administration team. Regularly working with the wider finance team to ensure legacy income is processed correctly. Frequent contact with the gifts in wills team and supporter care team.

Outside Diabetes UK: Frequent contact with executors, solicitors and legacy officers of other charities.

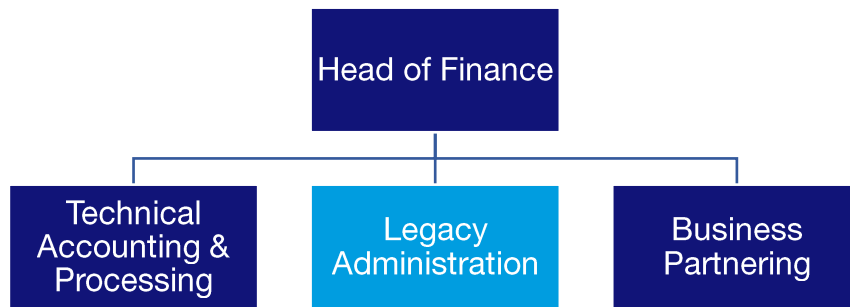
Key focus of the role:

You will be supporting the legacy administration team in the day-to-day administration of legacies given to Diabetes UK, including handling notifications, managing correspondence with solicitors executors, and supporting the financial processing of legacies, all to ensure that legacy income is maximised and received without delay.

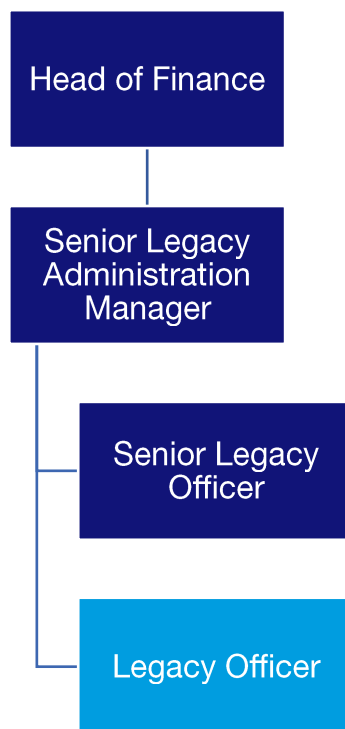
Directorate and team

This role sits in the **Legacy Administration Team** in the **Corporate Services Directorate**

Finance Department



Job and reporting line



Main responsibilities

Person specification

All jobs at Diabetes UK are based on

- The key activities you'll undertake and
- The skills, knowledge, experience and behaviours you need to be successful in this role

You will be able to:

- Provide administrative support to the Legacy Administration team, who are responsible for the legacies left to Diabetes UK, including tasks such as:
 - Creating and maintaining records on First Class for all legacy bequests.
 - Handling legacy correspondence and other documentation, assigning them to the relevant legacy case files on First Class.
 - Working with the finance income team to allocate legacy income.
- Build positive relationships with supporters, executors, family members and co-beneficiaries, working collaboratively with them to ensure that all legacy income due to the charity is received in a timely manner.
- Learn and embed techniques, systems and best practice to enhance our Legacy Administration function.
- Assist in ensuring procedures and standards are well implemented across the Legacy Administration team.
- Follow legal, regulatory, organisational policy and best practice standards for Legacy Administration.
- Develop your own skills and capabilities within Legacy Administration to continue to grow and learn, promoting the Diabetes UK values and positive culture at all times.
- Depending on experience:
 - Work towards having your own caseload of pecuniary legacies, including corresponding sensitively and effectively with family and friends of the people who have left a legacy to Diabetes UK.
 - Review the open legacy case files with the rest of the Legacy Team and follow up on actions raised.
- Use initiative and judgement to resolve basic problems independently.

- Undertake assigned or routine tasks in a timely manner and to a high standard.
- Plan, organise and prioritise your own workload.

You will have experience in:

- Customer service with experience of explaining information clearly and handle sensitive conversations with empathy and professionalism.
- Working with databases, records management and case management systems.
- Working as part of a team, as well as being self-motivated to work effectively on personal objectives.

You will have skills in:

- Clear communication skills including writing and speaking on the telephone.
- High attention to detail.
- Maintaining accurate information and using data to support decision-making.
- Problem solving and thinking dynamically, and being able to recognise when to ask for support with your work.

You will have knowledge of:

- Wills, Probate, or Trust law, or be keen to develop this knowledge.
- Legacy administration practices, or be keen to develop this knowledge.
- Relevant procedures related to the role, and the quality outputs and standards required, or be keen to develop this knowledge.

The best person for this job will be (behaviours):

I make change happen

- driven to maximise income to the charity, supporting the change the charity makes.
- focussed on getting things done.
- collaborative and a strong team player.
- committed to EDI and tackling inequalities.

I put people first

- able to recognise that people are individuals with different preferences, circumstances and needs.
- respectful and kind to the people we support, conscious that they may be recently bereaved.

I keep things simple

- able to prioritise your work so that you're clear about what needs to be done at any given time.
- focussed on productivity and cost effectiveness keeping things as simple as they can be.

I am driven to know more

- curious about the work you do and the people we support.
- have a reflective approach and support others to have the same.
- keen to develop professionally and expand your responsibilities.

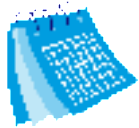
Qualifications/professional membership (if applicable):

BENEFITS

We know you do more than just work. And that means you might be a parent, carer, friend, volunteer or partner.

We want to make sure that we can help you create a good balance between work and the other parts of your life.

And one way we do that is with benefits we offer you.



Annual leave

We want you to make sure you get time off to rest and relax. So, all full-time permanent employees get 25 days off a year, with bank holidays on top of this.



Connected working

We have adopted a 'connected working' way of working. This means that, for most roles, you are not required to work in an office location every day.



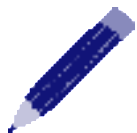
Pension

We enrol everyone into our pension and all new colleagues joining us will get information on the pension scheme. We make an employer contribution of at least 5%.



Healthcare

Our cash healthcare plan that allows you to claim back the cost of regular health appointments and treatment, like the dentist and optician.



Learning and development

We help you to continually develop and achieve your career goals, including offering a wide range of training which happens throughout the year.



Gym membership

We have a gym membership discount scheme through our cash healthcare plan provider. You can use this at a wide variety of gyms around the UK.



Our Networks

A range of active and supportive colleague networks such as the Pride network, Global Majority network and Women's network.



Early finish Friday

Early finish Friday and flexible working as part of our approach to activity-based working (not applicable to roles with fixed shift patterns).



Employee assistance programme

Employee assistance programme to give you support on any issues that come up in life.



Annual season ticket loan

Annual season ticket loan* (on completion of your probation period and if contract is permanent or longer than 12 months).



Cycle to work scheme

Cycle to work scheme.

Get in touch

Email recruitment@diabetes.org.uk

Call **0345 123 2399**

Visit diabetes.org.uk

Search **Diabetes UK** on Facebook, Twitter, YouTube and Instagram

