



Chief Operating Office - Legal

Job Title:	Legacy Administrator
Reporting to:	Head of Legal Services
Dogs Trust Grade:	F
Location:	London office

Job Purpose

Responsible for assisting with the administration of legacies, supporting the Legacy team to meet the legacy income budget.

Overview of the Department/Team

The role is part of the legacy team within the Legal Department, which provides commercial advice to the charity and reports into the Chief Operating Officer. We work to ensure that Dogs Trust is operating legally and efficiently so that the organisation can carry out its charitable work effectively.

Key areas of accountability

Responsible for handling incoming post and opening new files on the First Class 4 legacy database, inputting data from solicitors' notifications and from Smeed and Ford reports.

Responsible for managing a caseload of pecuniary and specific legacies and straightforward residuary legacies, to ensure that the charity receives its bequests in a timely manner, recording correspondence and income accurately.

Represent and protect the interests of the charity in all correspondence and deal appropriately with legal professionals, other beneficiaries, and members of the public, answering telephone queries and monitoring the teams' Legacies inbox. Report or refer any significant decisions or risks to Senior Legacy Officer/Head of Legal Services.

Record and keep up to date all relevant information regarding a legacy on the First Class 4 database, keeping all cases under regular review to ensure timely receipt of income.

Assist with financial, legacy, and other reports and spreadsheets as directed.

Assist with specific gifts left to the charity, obtaining valuations and advice on disposal to achieve maximum income.

Any other reasonable duties.

Person Specification

Essential skills, qualifications, experience, and attributes

Proven administration skills, preferably gained in the charity or another regulated sector.

Excellent written and verbal communication skills.

Experience of drafting professional correspondence, ideally to solicitors and surveyors.

Highly organised, able to demonstrate experience of managing and prioritising own workload and use of initiative.

Experience of dealing with the general public, preferably in a charity environment.

Able to demonstrate a patient and calm manner in dealing with members of the public and an ability to empathise with bereaved family members.
Meticulous attention to detail.
Demonstrates strong numeracy skills and has experience in using First Class application and is confident with all Microsoft office applications.
Experience of organising meetings and taking and writing up notes and or minutes.
Knowledge of Wills, Probate and Trust law.
<i>Desirable skills, qualifications, experience, and attributes</i>
ILM Certificate in Charity Legacy Administration.
Interest in charity legacy sector.
Empathy with the mission of Dogs Trust.

Additional information
This is a Hybrid role, working in line with Smarter Working policies (which typically consists of 40% of time based at our London office, and the rest from home).
Typical working hours are 9am to 5pm.
Last revised: June 2024

