



Deputy Chief Executive Office - Finance, Governance and Legal

Job Title:	Legacy Officer
Reporting to:	Senior Solicitor
Dogs Trust Grade:	E
Location:	London office with hybrid working

Job Purpose

The Legacy Officer is responsible for the administration of legacies, ensuring that the charity receives its full entitlement from all gifts left in a Will.

Overview of the Department/Team

The Deputy CEO Office (DCEO) plays a key role in overseeing Dogs Trust's internal operations, ensuring the effective management of the Charity's financial, legal, IT, efficiencies, facilities, and governance functions. The office works closely with senior leadership to support the organisation's Rehoming Centres, prevention programmes, and international efforts. Its focus is on ensuring smooth internal processes and great customer service, that enable delivery of the mission and strategic goals of the UK's largest dog welfare charity.

The Finance, Governance and Legal Directorate provides expert financial advice and central support across the organisation, enabling the delivery of Dogs Trust's strategy. The directorate oversees financial planning and reporting, treasury, transaction processing, and compliance with statutory requirements. It also includes key specialist functions such as governance, risk, compliance, and legal.

The Legal Department sits within the Finance, Governance and Legal Directorate and is responsible for overseeing all legal matters relating to the charity's operations and activities, ensuring compliance with applicable laws, managing legal risks, and providing strategic advice across a wide range of issues. The department works closely with senior leadership, trustees, and external legal partners to navigate complex legal challenges, and is also responsible for Legacy Administration.

Key areas of accountability

Responsible for administering a case load of pecuniary, specific, life interest and residuary legacies, to ensure that the charity receives its full entitlement from all bequests and maximising their value wherever possible. Ensuring that valuations are obtained for assets in the estate, liaising with external stakeholders, such as executors, solicitors or any other parties.

Review of Estate Accounts to ensure that an estate has been correctly administered to include the allocation of Capital Gains Tax (CGT) and Inheritance Tax (IHT).

Represent and protect the interests of the charity in all correspondence and deal appropriately with legal professionals and members of the public, answering queries as

required. Report or escalate any significant decisions to the Senior Solicitor or the Head of Legal Services.
Record and update all relevant information regarding a legacy on the First Class 4 database, ensuring accurate data entry and maintenance of records. Responsible for ensuring reviews are updated on files.
Assist with financial, legacy and other reports and spreadsheets as required.
Input of R185E certificates to the database efficiently.
Maintain accurate records and provide recommendations to progress cases requiring management/Trustee input or carrying reputational risk.
Confident engagement with legal professionals (solicitors, surveyors and accountants) and executors, handling sensitive matters empathetically.
Assist the Senior Solicitor with administering estates on behalf of the charity.
Any other reasonable duties.

Person Specification
<i>Essential skills, qualifications, experience, and attributes for shortlisting purposes</i>
Proven experience in legacy administration.
Excellent knowledge of Wills, Probate, Tax and Trust law.
Highly organised and able to demonstrate experience of managing and prioritising own caseload.
Able to demonstrate ability to analyse, make decisions and problem solve.
Experience of handling a wide range of enquiries and an excellent telephone manner.
Numerate and computer literate, with experience of using the Microsoft Office suite, including Excel, Outlook, Teams and SharePoint.
Knowledge of First Class 4 database and compiling reports.
<i>Other essential requirements assessed at interview and/or through a practical assessment</i>
Excellent attention to detail.
Excellent verbal and written communication skills.
Proactive and flexible team player.
Commitment to the aims and objectives of Dogs Trust.
<i>Desirable skills, qualifications, experience, and attributes</i>
Certificate in Charity Legacy Administration (CiCLA - ILM).
Good knowledge of charity law.

Our values and behaviours
The culture at Dogs Trust is based on our values and behaviours which underpin everything that we do.
<u>We dream big</u> Thinking boldly – We channel our passion and commitment to be open to new ideas and possibilities, and to be brave enough to generate and try out new ways of working. Embracing change – We have the courage, imagination and flexibility to focus on what really matters and adapt as needed to turn our dreams into reality.
<u>We're on the ball</u> Staying curious – We pay attention to what's going on around us and remain open-minded. We learn from others and consider different angles and perspectives. Focusing on impact – We are passionate about the difference we make. We use our knowledge and experience to plan our work, solve problems effectively and achieve what we set out to do.
<u>We make things happen</u> Being proactive – We have a positive, can-do attitude. We actively build strong relationships with others to solve problems and create opportunities. Working together – We are collaborative and inclusive. We create relationships based on kindness, trust and respect to bring out the best in ourselves and others.

Additional information

A basic Disclosure and Barring Service Check (DBS) and credit check will be required for this role.

Roles based at our London office operate a smarter working model, which includes working from the London office and from home, depending on the task.

Last revised: June 2026

