JOB DESCRIPTION AND PERSON SPECIFICATION

Role	Legacy Officer		
Location	London / Hybrid within the UK		
Contract Type	Permanent	Contract Length	N/A
Salary	£35,000 - £38,000 (dependent on experience)		
Office attendance / travel requirements	Expected travel for this role is: Meeting internal and external stakeholders as required, approximately twice per quarter; this may increase during busy periods. In addition, attendance to two all-staff away days per year and team away days in London on a quarterly basis.		

CONTEXT

We're a community of volunteers, donors, researchers and campaigners, working together to beat blood cancer. We fund research, offer support, and campaign for better treatments.

This role sits within the Legacy Team, within the Engagement Directorate and the role will be line managed by the Senior Legacy Manager. You will be working closely with the Supporter Relations Team, Finance and Research teams to ensure that legacy income is processed in accordance with internal policies.

You will be responsible for the management of a portfolio of legacy cases where the charity is named as a beneficiary; work with external solicitors and lay executors to ensure that gifts are received in a timely fashion and that all internal and external procedures and legislation is adhered to; promote pragmatic solutions and refer appropriate matters to the Senior Legacy Manager to ensure all reputational risks are proactively managed.

Additionally, you will be required to work on projects to improve the Legacy Team's ways of working and to help support with the development and delivery of the team and organisational strategies.

Our teams work hard every day to make a true difference in the lives of those affected by Blood Cancer. We are proud to support them with a range of benefits, recognition and many options for agile working. All contributing to a strong work/life balance. We also have various learning opportunities to support you in your development and help you grow to realise your potential and shape a career with Blood Cancer UK.

KEY RELATIONSHIPS

Reports to	Senior Legacy Manager
Line management responsibilities	n/a

Key relationships	**Internal contacts:** Finance, Regional, Supporter Relations, Research, External comms/Media, P&P **External contacts:** Solicitors (acting for Blood Cancer UK or as executors), lay executors, relatives and friends of the deceased, other charity legacy teams, estate agents, surveyors, tracing agents and others as necessary

MAIN RESPONSIBILITIES

Legacy Administration

- Proactive management of legacy cases – including pecuniary, specific, residuary, and life interest matters – in a sensitive, accurate and timely manner.
- Ensuring effective and efficient communication with external solicitors and co-ordinating an approach where necessary with charitable co-beneficiaries, whilst always representing and fully upholding Blood Cancer UK's values.
- Communicate to bereaved relatives and lay executors in a sensitive manner and effectively explain Blood Cancer UK's obligations as a registered charity.
- Ensure that the charity receives its full entitlement from all legacies, maximising their value wherever possible, by applying specialist knowledge and best practice and working closely with colleagues and legacy officers at other charities as appropriate.
- Ensure income and accruals are recorded accurately including timely estimates and restricted gifts so that reporting can be used for high level planning.
- Scrutinise estate accounts and ensuring that an estate has been correctly administered according to the Will, including allocation of CGT, IHT and appropriate level of professional fees.
- Ensure that the charity receives and processes R185E certificates efficiently.
- Accurately recording all relevant information regarding a legacy on the FirstClass 4 database.
- Work in accordance with The Charities Act 2011 (as amended by The Charities Act 2022), Charity and Data Protection Regulation Legislation, including and not limited to, ICO, GDPR, FRSA and Charity Commission guidelines.
- Proactively identifying potential claims including (but not limited to) Inheritance (Provision for Family & Dependents) Act 1975, Capacity, Validity, Undue Influence, Proprietary Estoppel and Fraud and referring the same to the Senior Legacy Manager.
- Identify potential financial, reputational and operational risks for each case and ensure that these are appropriately mitigated and referred to the Senior Legacy Manager.

General

- Work collaboratively across the organisation to ensure the deceased's wishes are carried out fully and ensure family and friends of the deceased have a positive experience when engaging with us.
- Support the legacy management function, ensuring that income is secured in line with monthly and annual forecasts, information is obtained and updated to enable accurate forecasting and that KPIs are delivered.
- Demonstrate and maintain thorough understanding of Wills, Probate, Trusts and Tax laws as well as developments within the legacy sector.
- Ensure specialist knowledge is kept updated and promote and deliver proactive sharing of knowledge.
- Evaluate and improve legacy processes and ways of working.
- Support with the development and delivery of team strategies.

THINGS WE ALL DO

- Promote Blood Cancer UK's vision, mission and core values
- Support Blood Cancer UK's commitment to actively promoting equality, diversity and inclusivity
- We're all fundraisers. This is slightly different for all roles, and your team will have fundraising KPIs and objectives we all work to
- Attend and assist at Blood Cancer UK events and activities as required (NB this involves evening and weekend work)
- Be an effective ambassador for Blood Cancer UK at any activity you attend
- All staff are expected to adhere to Blood Cancer UK's policies and procedures
- Do any other reasonable things your manager needs you to do
- We work in partnership with our community by actively involving people affected by blood cancer in the decisions we make about our work – what we do and how we do it

PERSON SPECIFICATION

Skills, knowledge and experience
Knowledge and experience of using the FirstClass4 database
Experience of legacy administration, ideally within a charity context
Completed CiCLA qualification or equivalent legal qualification
Knowledge and understanding of the different types of contentious cases with the ability to manage a variable workload of non-contentious legacy cases
Excellent analytical and numeracy skills; understanding of and ability to carry out income tax, capital gains tax and inheritance tax calculations
Ability to read and analyse estate/trust accounts
Attention to detail to identify ways to optimise legacy income
Excellent communication and interpersonal skills with the ability to work with people at all levels.
Ability to make and influence decisions based on legal requirements and duties, needs and resources of the charity, and duties to individuals and other relevant matters.
Understanding of the legal frameworks relating to the law of Wills and Succession (to including Contentious Probate claims) in England and Wales, Scotland, the EU and other jurisdictions.
Ability to deal with queries in a diplomatic, professional and confidential manner both verbally and in writing.
Actively seeks out and contributes to the development of new methods, tools, processes or ways of working.