

Legacy Case Officer Job Description

Reporting to Legacy Manager

Department Fundraising

Purpose of the job

To take the overall responsibility and accountability for managing the charity's legacy cases, ensuring Leonard Cheshire (LC) receives the maximum income from the estates to which is entitled, and that the charity and its Trustees are protected in law.

To represent LC whilst liaising with solicitors, non-professional executors (including next of kin) and legacy staff from other charities. To proactively manage these relationships to ensure that the Legacy team delivers against team key performance indicators and income targets.

To develop and implement legacy administration processes to manage and grow future income.

Key responsibilities

- Act as the main contact for legacy estate enquires. Ensure all correspondence and income is received and recorded on First Class, the legacy database.
- Be responsible for the administration of all legacy case files, operating within agreed schedules and processes.
- Liaise with key internal and external stakeholders including senior staff, solicitors, non-professional executors (including next of kin) and legacy staff from other charities, making recommendations to maximise the legacy value whilst maintaining the reputation of LC.
- Maintain an accurate legacy case database, ensuring all communications for each individual case are recorded, up to date and clearly identifiable.
- Approve final estate accounts, Inheritance Tax Forms and property offers on behalf of LC, using your expertise to ensure LC receives its full entitlement.
- Prepare monthly finance reconciliation of legacy income across Fundraising and the Financial Accounts team.

- Work with the Legacy Manager to support the development of relationships with executors and next of kin, in a way that maximises income for LC, ensuring necessary data is recorded on first class.
- Ensure that all relevant provisions of the Charities Act 2011 and subsequent updates are observed, seeking legacy or legal advice where appropriate.
- Maintain high standards of legal and tax knowledge and best practice and keep abreast of developments in the legacy sector, undertaking training where necessary.
- To be an active member of the Leonard Cheshire Legacy Committee, and administratively support committee meetings with papers and other relevant documents.
- Prepare resolutions and cy pres schemes as required for approval by the LC board of trustees.
- Any other duties as required in line with skills, knowledge and experience of post.

Person specification

Essential requirements

- Educated to degree level or significant equivalent work experience or Legal and / or legacy administration qualification (Solicitor, ILEX, CiCLA qualification).
- Demonstrable experience of working in a similar role at a charity or as part of a legacy/charities team for a firm of solicitors.
- Substantial knowledge of probate, trusts, tax and property related issues as relate to charitable legacies.
- Proven experience of managing multiple priorities and caseloads.
- Ability to make complex decisions based on legal requirements and duties, needs and resources of the charity and duties to individuals.
- Ability to work independently, prioritise and manage an extensive workload.
- To be highly organised, particularly to allow for the effective retrieval of case information in many years' time.
- Demonstrable experience of using databases.
- To have a genuine commitment to the values and ethos of Leonard Cheshire.

Our values at Leonard Cheshire

Positive warm and empathetic, we always look to progress and improve.
Proud strong-willed and spirited, we are firm in our beliefs.

Pioneering confident and imaginative, we are creative change makers.

Leonard Cheshire welcomes applications from all sections of the community. We actively encourage applications from people with a disability, supporting where possible, your requirements for reasonable adjustments.

