JOB PROFILE: LEGACY ADMINISTRATION MANAGER

Role:	Legacy Administration Manager	Date profile last reviewed:	November 2024
Name:		Reports to:	Head of Finance

MAIN SUMMARY OF ROLE:

The RAF Benevolent Fund (the Fund) receives a significant proportion of its voluntary income from gifts in Wills. The Legacy Administration Manager is responsible for optimising legacy income for the charity, ensuring that it is secured and received as soon as possible and that the interests of Trustees are protected. To be successful, the post holder will be highly knowledgeable and experienced in legacy administration including dealing with challenging issues with wills and building strong relationships with Executors and families. The Legacy Administration Manager, while ensuring that income from the pipeline is optimised, will also protect the reputation of the charity as they carry out their duties. The post holder will work collaboratively and proactively with the Legacy Marketing Manager and other colleagues in both the Fundraising and Finance teams.

KEY ACCOUNTABILITIES/RESPONSIBILITIES:

- Maximise the income left to the Fund as gifts in wills and contribute to the setting of the legacy income target.
- Liaise with executors and solicitors of legacies left to the Fund to ensure payment and relevant documentation are provided. Check and, if necessary, challenge the conduct of the administration of an estate by executors or solicitors.
- Create case files for all new notifications and contact executors and solicitors as appropriate.
- Keep up to date with external research and reports on legacy income and trends and provide insight to inform updates for Senior Management Team and Trustees.
- Provide the Fund's data to the Legacy Foresight benchmarking activity.
- Provide statistics on key performance indicators to inform legacy income targets as well as providing written updates on legacy income for the reports for the Senior Management Team and Trustees.
- Provide training and technical advice on legacy administration to other staff when required.
- Identify potentially contentious issues and make recommendations for resolution. Liaise with co-beneficiaries and if necessary, instruct solicitors when this is the only recourse available.
- Review open files on a regular basis and check they are up to date including reversionary estates. Check that trust funds in relation to reversionary interests are properly invested and that life interests are remaining.
- Work within the Legacy delegation scheme to ensure the correct level of authority governs decision making.
- Prepare briefing papers for the appropriate decision makers when required.
- Review Will and estate accounts for accuracy and, where necessary, question estate accounts (including challenging solicitors' fees, ex-gratia payments and expenses) and tax deduction certificates.
- Check that any Capital Gains tax and Inheritance Tax appearing in estate accounts is correctly calculated and correctly apportioned between the beneficiaries.

- Consult with colleagues including the Director of Finance and Head of Housing when a legacy bequest includes the gift of a property, company shares or specific items to ensure the Fund gains maximum benefit.
- Maintain legacy records on the Fund's main contacts database, CARE
- Ensure all legacy income is banked and recorded accurately. Provide tax certificates so the tax can be claimed from HMRC.
- Maintain accurate records to allow income to be recognised accurately and in compliance with the relevant rules.
- Arrange for the sale of specific items left to the RAF Benevolent Fund by Will where required.
- Collaborate with the Fundraising colleagues for example to develop a supporter care programme for legacy executors and review the provision of online Wills as required.
- Identify cases in which there are claims against an estate in which we have an interest.
- Keep up to date with developments in the law and external factors relating to the administration of estates and any impact on estate asset values.

COMPETENCIES REQUIRED FOR THE ROLE	
<u>Essential</u>	<u>Desirable</u>
• Working with people • Planning and organising • Delivering results & meeting customer expectations • Adapting & responding to change • Achieving personal work goals & objectives	

QUALIFICATION(S), KNOWLEDGE, SKILLS AND EXPERIENCE REQUIRED FOR THE ROLE	
Academic or Professional Qualifications (or equivalent):	
<u>Essential</u>	<u>Desirable</u>
• Degree level education or equivalent vocational qualifications/experience	• ILM Certificate in Charity Legacy Administration or a qualified solicitor • STEP (Society of Trust and Estate Practitioners) qualification
Knowledge/ Experience:	
<u>Essential</u>	<u>Desirable</u>
• Previous experience of legacy administration in the charity sector or Probate department in a form of solicitors or Trust Corporation • Strong knowledge of relevant laws and tax rules pertaining to wills • Working knowledge of GDPR • Experience of using a computerised database for legacy administration • Able to manage and prioritise own workload • Able to communicate effectively, empathetically and confidently to a wide and varied audience • Good finance and accounting knowledge, particularly estate accounts • Excellent interpersonal skills • Be committed to the values and ethos of the Fund	• Experience of using FirstClass4 Legacy database • Experience of legacy marketing • Use of CARE database • Knowledge of the Royal Air Force
Skills/Abilities	
<u>Essential</u>	<u>Desirable</u>
• Effective time management and communication skills.	

Other Requirements:

- Ensure implementation of all relevant Fund policies and procedures and keep them under review.
- Ensure that the charity's values are put into practice when carrying out duties.
- Attend meetings, conferences and training events as agreed with your line manager.
- Attend Legacy Marketing events as required.

- Such other duties as may reasonably be required.

Signature

I confirm this job profile has been drawn up with my full involvement and accurately reflects the responsibilities of the role.

Postholder's Signature: NAME:

Line Manager's Signature: NAME:

Date: