

**Job Description**

**For**

**Legacy Officer**

**Responsible to:**

Senior Legacy Officer

**Aim of the job:**

All aspects of Legacy Administration for World Horse Welfare including:

Responsibility for the delivery of the income donated to World Horse Welfare in our supporters Wills, ensuring this income is protected and maximised through effective stewardship and administration. Ensuring compliance requirements are always met and deliver best practice, building on reputation for sensitive and effective legacy administration.

**Key Working Relationships**

Director of Finance and Administration

Fundraising Marketing team

Executors

**Main Duties and Responsibilities**

* Manage a proportional caseload of legacies left to World Horse Welfare in supporters Wills and as far as reasonably possible identify all reasonable opportunities to maximise the value of the bequests and take appropriate steps to realise value
* Proactive involvement with property and other asset sales
* Proactive involvement in probate disputes affecting World Horse Welfare’s entitlement
* Ensuring that tax concessions available to charities have been correctly received and tax exemptions correctly applied
* Checking Wills and Estate accounts
* Liaising as necessary with other charity beneficiaries
* Regularly review cases and ensure continued progress
* Present a favourable and helpful image of World Horse Welfare to outside contacts such as solicitors, trust corporations and the public
* Prepare explanatory summaries for Directors/Trustees where Deeds, Settlements, Agreements or Ex Gratia applications require approval and/or execution
* Work with and assist the Legacy Marketing team in promoting legacies
* Keep up to date with sector developments and knowledge of this area
* Forge excellent relationships across all areas of World Horse Welfare to identify opportunities where appropriate
* Adhere to the values, strategy, and objectives of World Horse Welfare
* To undertake other job-related tasks as directed by the Senior Legacy Officer.

**Health & Safety**

* To comply with the policies of World Horse Welfare to ensure that risks within the working environment are reduced as low as reasonably practicable
* To raise any health and safety concerns with your Line Manager or the Health & Safety Officer based at Head Office

**Person Specification**

**Essential**

* Previous experience working as a Legacy Case Officer
* Proven experience of complex administrative work
* Basic understanding or demonstrable ability to learn and understand law pertaining to Wills, Taxation, Probate, Trust, Property, Charities, the rules governing contentious and non-contentious Probate Law and the IOF Code of Practice
* Strong analytical, problem-solving and investigation skills
* Ability to assess risk against benefit to reach a well-rounded conclusion
* High organisational skills with the ability to maintain a number of cases simultaneously
* Excellent interpersonal and communication skills
* Willingness to engage in continuous personal development
* Strong Microsoft Offices skills including Word, Outlook and Excel