

Job Title:	Senior Legacy Officer	Division/Dept:	Income & Engagement – Legacy Management
Reports To Manager:	Legacy Administration Manager	Job Family:	Support & Professional
Date:	March 2016	Band:	6

Purpose: To manage a portfolio of complex files and assist the Legacy Administration Manager with forecasting and reporting to senior management to achieve the department's goal to deliver PDSA's forecasted legacy income

Responsibilities	Performance Measures	Organisational Skills & Values
<ul style="list-style-type: none"> Lead, develop and manage the team through the whole employee lifecycle and direct the legacy officers and specialist administrators to ensure prompt payments of legacies whilst being mindful of the reputation of the organisation and legal constraints. Apply specialist technical knowledge to enable delivery of the department's objectives and efficiently administer and maximise legacy income. Ensure that the organisation's full and correct entitlement is received in accordance with the law and the benefactor's will Assist with the accuracy of data collection on Phoenix and the legacy pipeline to ensure future forecasting is reliable. Contribute towards ongoing legacy forecasting by closely monitoring files, accurately inputting data on Phoenix and reporting findings/developments to management Establish and maintain positive and professional relationships with the legal profession which enhance the potential of PDSA as a current and potential beneficiary Proactively manage a portfolio of complex Legacy Cases. This will include: ensuring all appropriate actions have been taken by the executors during the administration of the estate, liaising regularly with Legacy Officers of other charities on matters relating to shared estates, with a view to arriving at an agreed common approach and ensuring that PDSAs entitlement is maximised where appropriate and the prompt payment of sums due to PDSA to prevent undue delays in the administration of the trust/estate. Monitor life interest trusts where PDSA has an interest in remainder. Ensure lines of communication are kept open with Executors and Trustees so that PDSA's interest is not overlooked Sign and approve estate accounts and receipts where authority has been delegated by the trustees Deal with Charity Commission to comply with legislative requirements Share complex cases with the legacy management team to build on existing knowledge Assist the Legacy Administration Manager with initiatives and projects as and when required Keep up to date with developments in the law relevant to wills and estate administration and any new legal precedents that may have an impact on the department/organisation Compliance with Delegated Authority policy Compliance with Data protection and Security policy Compliance with all PDSA policies and procedures 	Dimensions	Role-specific knowledge & skills
	<ul style="list-style-type: none"> Income target achieved Legal Fees cost savings made to target Strong working relationships with legacy management team Compliance of prompt and efficient payments to PDSA through SLA and KPIs Compliance with SLA Direct Reports – up to 4 Indirect Reports – N/A Budget: in line with financial mandates and Delegated Authority Internal Contacts: Donor Engagement team, Legacy Product Manager, Legacy & Community fundraising, Finance, Property, Public Relations, Retail and Veterinary External Contacts: Existing/potential PDSA supporters, Solicitors/legal representatives and executors, Legal profession, Institute of Legacy Management 	<ul style="list-style-type: none"> Head and Heart Better together Passion with purpose Leading effectively Planning and organising Acting Commercially <p>Essential</p> <ul style="list-style-type: none"> Proven substantial, specialist technical legal knowledge Demonstrable significant understanding of charitable legacies, law of wills, tax, contentious & non-contentious probate matters & charity law Legal qualification/working towards CiCLA or similar Experience of working in a fast paced environment Ability to work to a process but with the confidence to challenge <p>Desirable</p> <ul style="list-style-type: none"> Private client/probate solicitor Previous line management experience Basic financial knowledge & skills with understanding & application of budgets, cash flows & forecasts
Approved By: R&D Manager		Date: January 2023