



Excellence in
Legacy
Administration

Excellence in Legacy Administration 2023
Tuesday 5th Dec 2023 - Online Conference
Wednesday 6th Dec 2023 - Skills Workshops (limited places)

09:30 – 09:35	Introduction & Welcome to ELA23 Suzanne Watts, Senior Producer, Smee & Ford
09:35 – 10:00	Update: Smee & Ford Legacy Sector Data The essential session to facilitate your planning into 2024. A look at charitable estates processed by Smee & Ford so far in 2023, including the latest data on legacy income and probate case trends. Polly Avgherinos, Managing Director, Smee & Ford Mark Pincher, Head of Data, Smee & Ford
10:00 – 10:10	Live Q&A
10:10 – 10:25	Short break and session change
10:25 – 11:10	Update: Latest developments in the Legacy Sector - now and for the year ahead Leading legacy experts from the sector give their insight into the changes, developments and challenges affecting the legacy administration sector including: The latest insight on HMCTS working timelines. Current timescales around probate notifications Inheritance Tax incentives and their importance to charitable wills - could this be at risk? Scottish Wills - The challenges around the processing & progress with Scottish Government

	<p>Matthew Lagden, CEO, Institute of Legacy Management Alex McDowell, Vice Chair of Remember a Charity and Director of Fundraising at Revitalise</p>
11:10 – 11:25	Short break and session change
11:25 – 11:50	<p>Bequests: Managing property gifts in a slower market</p> <p>In this highly topical session, we look at how the recent drop in property prices, high interest rates and the ongoing cost of living crisis, has had a noticeable impact on the property sector. This combination of factors can turn a property bequest into a more challenging and resource-draining situation.</p> <p>Working through a mix of often seen scenarios and more unusual cases, Ben Darlow will suggest what legacy administration teams can do to achieve the best results from property bequests across residential, commercial and agricultural properties. The session will include solutions and guidance on:</p> <ul style="list-style-type: none"> • Whether to disclaim or not • Willing or unwilling personal representatives • Immediate actions • Medium and long-term actions • Sitting tenants and eviction • Dilapidated properties • Judging when to sell or stall. • Reputational management <p>Ben Darlow, Legal Director, Shakespeare Martineau LLP</p>
11:50 – 12:00	Live Q&A / Polls
12:00 – 12:10	Short break and session change
12:10 – 12:40	<p>Bequests: Digital Assets – Virtual Bequests from the Next Generation of Donors</p> <p>How can the legacy administration sector prepare itself for the incoming wave of virtual and digital assets being left in wills? When</p>

	<p>non-physical possessions such as blogs, Instagram account content and intellectual property rights are left to a charity how can professionals value and process these gifts?</p> <ul style="list-style-type: none"> • What count as a digital asset? • Recent examples of digital bequests • Latest news on Charity Commission consultation • Valuing, storing and processing virtual assets.
12:40 – 12:50	Live Q&A/Polls
12:50-13:00	Summary of morning session & survey
13:00 - 14:00	Lunch Break
14:00 – 14:30	<p>Welcome back followed by:</p> <p>Leadership: Managing & motivating a hybrid legacy team.</p> <p>The new normal is here to stay. The majority of legacy administration teams now work a hybrid / from home working pattern that is a world away from past practices. We ask a panel of legacy managers how they are motivating, steering and supporting their multi-location teams, and still achieving best practise standards?</p> <p>Duane Saunders, Legacy Administration Manager, Marie Curie</p>
14:30-14:40	Live Q&A / Polls
14:40-14:50	Short break and session change
14:50 – 15:30	<p>Best practise: Implementing reality-based forecasting to manage expectations & internal pressure.</p> <p>The downside of a having a bumper or better than expected legacy income year can be the spectre of ever-increasing targets. This session will discuss practical ways in which legacy administrators can build a reality-based legacy income forecast – and how to then guide the interpretation of that data.</p> <p>We will look at:</p> <ul style="list-style-type: none"> • How to identify, accept and work with the obstacles in the system • The common factors that will reduce the final value of your bequests • The impact of contentious probate & the rise of ‘no win no fee’ cases

	<ul style="list-style-type: none"> • Early accrual v later accrual – when it pays to be under optimistic on your pipeline. • Wider stakeholder management & expectation control - SLT and beyond <p>Sarah Seddon, Head of Planned Giving, Combat Stress Louise Timbrell, Head of Legacy Management, NSPCC</p>
15:30-15:40	Live Q&A / Polls
15:40-15:50	Short break and Session Change
15:50-16:20	<p>Leadership: How legacy administrators can provide inspiration for their whole charity</p> <p>Legacy administrators play a vital role for income generation, and this extends beyond managing caseloads, all the way from notifications through to acknowledging income. An often-underappreciated aspect of their role is the valuable information and insight they can obtain from dealing with family members or lay executors of the legacy donor. Here the administrator has unique access to a mine of information that could provide many benefits for their legacy fundraising colleagues and wider charity.</p> <ul style="list-style-type: none"> • What can legacy data do to influence and inform other fundraising? • How can lay executor relationships be the start of donor conversations? • How can internal charity teams work together to shape, inspire and guide the wider legacy fundraising strategy at their organisation? <p>Clare Sweeney, Founder, Keepace</p>
16:20 -1630	Live Q&A / Polls
16:30	Summary and end of day

BOOK NOW

This year ELA23 will be complemented by two optional 90-minute **Skills Workshops, taking place on Wednesday 6th December**, where a limited number of attendees can examine a specialist topic in depth, led by experts from the sector. You can find out more about the workshops [here](#).