



Assistant Legacy Officer

Salary: £25,000 per annum

Hours 35 hours per week

Responsible to Legacy Officer

Based In Hayle, Cornwall

MAIN PURPOSE OF JOB:

To support the flow of legacy income ensuring the smooth, efficient and sensitive handling of gifts received through bequests, wills and estates.

The role requires a close attention to detail, accurate record keeping, and good numeracy. Appropriate and sensitive written and oral communication with families, legacy supporters and solicitors is very important. The role requires compliance with legal and regulatory requirements.

In essence, an Assistant Legacy Officer is a vital part of a charity's fundraising efforts, ensuring that legacy gifts are processed efficiently and effectively, maximising their value and impact. Most of all, it is about honouring the wishes of those who support us by way of gifts in their Will.

Although the role of Assistant Legacy Officer sits within the Finance Team, it will also include some elements of legacy fundraising and marketing in collaboration with the Marketing and Fundraising team. This includes promotion of our free Will service and supporting promotion of legacy giving through campaigns and events.

MAIN DUTIES & RESPONSIBILITIES:

RESPONSIBILITIES

- **Legacy Administration:**
Managing a caseload of legacies (pecuniary, specific, etc.), ensuring the organisation receives its full entitlement, and keeping records up-to-date.
- **Communication:**
Interacting with solicitors, executors, and other beneficiaries, responding to inquiries, and providing updates on legacy progress.
- **Record Keeping:**
Maintaining accurate and detailed records on the organisation's Digbi system, ensuring compliance with regulations and facilitating reporting.
- **Compliance:**
Keeping abreast of probate matters and ensuring the charity's legal rights are balanced with reputational considerations.
- **Collaboration:**
Working closely with the Senior Legacy officer and with other teams, when necessary, such as Pet Profile, Finance or Marketing teams in relation to legacy giving, legacy fundraising or gifts in wills.
- **Reputation Management:**
Ensuring all communications and actions related to legacies maintain the The Cinnamon Trust's positive reputation.
- **Other tasks**
Other tasks from time to time as required.

SKILLS AND ATTRIBUTES

- Strong written and verbal communication skills.
- Meticulous attention to detail.
- Ability to manage a demanding workload and prioritize tasks.
- Numerate: able to understand the presentation of accounts and income data
- Experience in the charity sector is helpful
- Knowledge of relevant regulations and legal procedures is beneficial.
- Some knowledge of wills and probate with willingness to engage in training in legacy administration.

Together with such additional general duties as the Employer shall reasonably require having regard to the needs of the Employer's business as a Charitable Trust.