



Legacy Officer

Job Title:	Legacy Officer
Salary:	£28,000 per annum
Hours:	35 hours (Mon to Fri, 9am – 5pm)
Responsible to	Senior Legacy Officer
location	Head Office, Hayle

Main purpose of job:

The Legacy Team is a vital part of our 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.

The Cinnamon Trust is looking for a Legacy Officer to support the flow of legacy income ensuring the smooth, efficient and sensitive handling of bequests received through wills and trusts and the promotion of gifts in Wills.

The role requires close attention to detail, accurate record-keeping, and good numeracy. The ability to communicate sensitively and confidently with supporters, families and professionals such as a solicitor is very important. The role requires compliance with legal and regulatory requirements.

The Legacy Team sits within the Fundraising Team, and the role will also include some elements of legacy fundraising and marketing in collaboration with the Marketing and Fundraising team.

Main duties and responsibilities:

- **Legacy Administration:**

Assisting with the management of a varied caseload of legacies (pecuniary, specific, etc.), ensuring the Charity receives its full entitlement, and keeping records up to date.

- **Communication:**

Interacting with solicitors, executors (both lay and professional), co-beneficiaries, family members and responding to inquiries, and providing updates on legacy progress. Dealing with queries from our Supporters and Volunteers about the Free Will offering and gifts in Wills.

- **Record Keeping:**

Maintaining accurate and detailed records on our 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, Fundraising or Marketing in relation to legacy fundraising. Assisting with the development of external working relationships such as with Solicitors and similar professionals to promote the services of the Charity.

- **Reputation Management:**

Ensuring all communications and actions related to legacies maintain The Cinnamon Trust's positive reputation.

- **Other tasks**

Other tasks from time to time as required.

Future development

The Trust is supportive of training and development. We are looking for someone who will commit to The Trust for the longer term.

PERSON SPECIFICATION

Legacy Officer

ATTRIBUTES	ESSENTIAL	DESIRABLE	HOW IDENTIFIED?
Knowledge	Knowledge of legal and probate processes Knowledge of CRM and/or data management systems Confidential data management Love of pets and understanding of their needs.	Qualification in legacy administration and/or legal qualification Knowledge of Excel Knowledge of GDPR Own family pets.	Application form Application form. Interview Application form & interview
Skills	Clear telephone manner Effective verbal communication skills according to audience Effective written communications skills according to audience Clear and accurate computerised notes onto cases and attention to detail. Ability to work collaboratively within organisation Ability to use a keyboard/Computer literacy	Office/customer service skills. Understanding the needs of elderly clients, bereaved family members & friends, and professionals such as Solicitors Understanding & ability to adapt writing style for different audiences as above Good standard of literacy and spelling. Team player Qualifications or Previous experience.	Initial telephone call to arrange interview and interview task Interview and interview task Application form and interview task Application form and interview task Interview & references Application form & interview task