



THE INSTITUTE  
OF LEGACY  
MANAGEMENT

# Corporate Partnerships

Your Guide



ILM's vision is **'To ensure every charitable legacy gift achieves its greatest potential'**.

Our mission is to support our members in the delivery of professional, proactive and sensitive legacy case management, to champion the interests of donors, members and charities to optimise the impact of legacy gifts and to drive professional standards and benchmark performance in legacy giving.

We are passionate about our work and are committed to ensuring that the final wishes of donors are fulfilled and that the value of each gift is optimised to ensure the impact upon beneficiaries is as great as it can be.

We are always interested in hearing from organisations who share our vision and who believe they can help us, in whatever way, to deliver our mission.

Whether helping to meet your corporate social responsibilities or simply to achieve more traditional commercial objectives we are certain that you will find partnership with the Institute of Legacy Management a unique opportunity of great value.

If you'd like to find out more please get in touch so we can arrange an initial discussion.

Yours sincerely

Chris Millward  
Chief Executive  
[ceo@legacymanagement.org.uk](mailto:ceo@legacymanagement.org.uk)  
07935 462 202



## Partnership benefits:

The core benefits of becoming an ILM corporate partner are as follows:

### Raise your profile

- An email announcement to our approx 600 members at the start of the partnership
- Your organisation's logo on the homepage of ILM's website
- A dedicated page (with logo and external link to your website) on ILM's website
- Promote your organisation via ILM's growing Twitter network

### Share knowledge and promote your organisation's expertise

- The opportunity to contribute to ILM's monthly member newsletter
- The opportunity to create a guidance note on a subject of mutual interest
- Provide content to support ILM's ongoing thought leadership and PR activities
- Opportunities to host/deliver ILM training courses
- Speaker opportunities

### Become part of our community

- Access to members only section of ILM's website (four users per firm)
- A copy of our monthly e-newsletter
- Invitations to ILM social events (including our member Christmas party)

### Annual conference

- One free place for your organisation at our flagship event (approx 250 attendees)
- Access (limited) to further places for your organisation at member rates
- Raise brand profile through on-site brand promotion (free to existing partners)
- Early bird opportunity to become headline sponsor for ILM's annual conference
- First refusal on additional sponsorship opportunities such as drinks reception and awards ceremony
- Network with members and other Corporate Partners

### Further opportunities (where possible)

- Brand association
  - Targeted marketing
  - Mentoring
  - Host social events
  - Provide venues for ILM training and meetings
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## The Detail

### Criteria for Corporate Partnership

The Institute of Legacy Management will consider partnering with organisations that:

- Share our vision and mission
- Understand and are committed to the charity legacy sector
- Provide products and/or services which will be of value to our members
- Are committed to delivering high quality products and levels of customer service
- Have a public image, reputation and business practices compatible with those of ILM
- Are financially stable

### Number of Corporate Partners

ILM does not limit the number of corporate partners, nor does it enter into partnerships indiscriminately. In deciding whether to increase the overall number of corporate partners we will take the following into consideration:

- The contribution each potential partner can make towards achieving our mission
- To fill known gaps or introduce new expertise in terms of specialisms represented
- Ability to support ILM's strategic goal to raise our regional/national profile
- Promotion of increased choice for members
- Healthy competition amongst partners versus any possible dilution in the value

### Application Process

The ILM currently welcomes new applications from all sectors.

Potential applicants are invited to contact the Chief Executive in the first instance for an initial discussion to explore motivations and expectations.

If it is agreed that the application should be progressed, formal application is by way of application form. This will be assessed by the Chief Executive and a decision made in conjunction with the Chair of the Board.



## Partnership fee

If successful, the current cost of ILM corporate partnership is **£3,500 (+VAT)** for 12 months.

## Suspension and Termination

ILM reserves the right to suspend or terminate the partnership:

- Where payment of the corporate partnership fees are outstanding beyond the payment terms of the invoice
- Where the corporate partner is the subject of any criminal investigation, legal proceedings or adverse publicity which ILM reasonably believes could adversely impact on ILM's own reputation by virtue of association.
- Where the corporate partner merges with or is taken over by another organisation and where the merger or takeover causes incompatibilities with the criteria and conditions contained in this document.
- Where the corporate partner is the subject of any insolvency proceedings.

## Marketing activity and Intellectual property

Permission to use ILM's branding will be decided on a case-by-case basis and ILM reserves the right to refuse permission. As a minimum ILM branded events should have sufficient relevance to ILM members and/or individuals/organisations ILM wishes to engage with as part of its strategic aims. Corporate partner events which, in ILM's opinion, are considered to conflict with ILM's training program and strategy will not be permitted to use ILM branding.

ILM will only agree to market those events which, in its opinion, are of sufficient relevance to its members and which it does not consider to be in conflict with its training program and strategy. ILM reserves the right to limit the number of events it will market to its members.



## Application for Corporate Partnership

Name of Organisation	
Name of Contact	
Telephone Number	
Email Address	

How did you first hear about ILM?

What do you know about our work?



Tell us about your organisation - your understanding of and work with the nfp/charity sector

Why does your organisation want to be a corporate partner of ILM?



In what ways could your organisation help deliver ILM's vision and broader mission?

What specific support could your organisation offer our members?

Signature	
Date	
Print Name	
Position	

Please return your completed form to: [ceo@legacymanagement.org.uk](mailto:ceo@legacymanagement.org.uk)

