



ILM CONFERENCE 2026

FRIDAY 8 MAY 2026

WELCOME AND UPDATE

10:00 - 10:30

James Stebbings and Matthew Lagden

SESSION ONE

10:30 - 11:00

THE CHANGING LANDSCAPE OF ESTATE ADMINISTRATION

Ian Bond, Farewill

Estate administration is evolving in ways that promise greater efficiency and transparency for everyone involved.

Adapting to these developments is vital if charities want to avoid missed opportunities for legacy income into the future.

In this session Farewill's Head of Legal, Ian Bond, navigates three areas of estate administration undergoing significant change, highlighting what charities need to know now to be ready for a modernised system.



SESSION TWO

STATE OF THE NATION

11:00 - 11:30

Dan Walton & Jo Masini, Legacy Foresight

Insights into the importance of legacies, short-term challenges and outlook, presenting a positive long-term perspective beneficial for the coming years



COFFEE BREAK AND DEMO ROOMS

11:30 - 12:05



SESSION THREE

12:05 - 12:35

MEDIATION MASTERCLASS WITH BATES WELLS

Leticia Jennings, Lucinda Ellen, Bates Wells
Plus guest speakers from leading charities

This interactive masterclass will guide delegates through the mediation process in legacy disputes - from the initial letter of claim to the final settlement agreement (or not!). Led by experienced practitioners from leading charity law firm, Bates Wells, the session will explore key decision points such as when to mediate, how to prepare effectively, and how to navigate complex dynamics with co-beneficiaries.



AWARDS CEREMONY

12:35 - 12:50

Hosted by Ashley Rowthorn, CEO of Legacy Futures

Announcing the winners of the ILM and Legacy Futures Awards

LUNCH AND DEMO ROOMS

12:50 - 14:00

SESSION FOUR

14:00 - 14:30

MAKING SENSE OF THE BUZZWORDS: WHAT DO THE WORDS MEAN AND HOW DO THEY AFFECT VALUE?

Freya Carroll MRTPI, Andrew Tompson MRICS, Berrys

Understanding planning legislation and key terms is critical for management and valuation of legacy land. In this session Berrys will introduce key planning jargon and discuss:

Why do these terms matter when assessing land value and development potential?

What are the practical influences on obtaining planning permissions?

This session will provide practical guidance on asking the right questions, commissioning surveys at the right time, and deciding when to sell land with or without planning permission. These elements all need to be reflected in an assessment of value and our approach to sale. How is this approached and how do we deal with the inherent uncertainty?



AGENDA

ILM CONFERENCE 2026



THE INSTITUTE
OF LEGACY
MANAGEMENT

SESSION FIVE SOLICITORS AS STEWARDS OF LEGACY PLANNING

14:30 - 15:00

Stephanie Kerr, Irwin Mitchell

Stephanie Kerr, Partner in the Will, Trust & Estate Disputes team at Irwin Mitchell, explores the evolving role of solicitors in legacy conversations, particularly in relation to charitable giving. As charitable donations through wills continue to rise, solicitors are increasingly positioned as key facilitators in helping clients structure meaningful legacy gifts and assisting executors in fulfilling the testator's wishes.



SESSION SIX LEGACY VOYAGE

15:00 - 15:30

Anna Phillips, Fiona Campbell-White, Gavin Holt - Foot Anstey
Andy Salmons - Legacy Consultant

The landscape of legacy administration is evolving fast. Communication moves at light-speed, workloads are increasingly complex, and charities bring a vast range of experience, expectations and working styles to every estate. Against this backdrop, how do we make confident decisions that maximise legacy income while avoiding the pitfalls of unnecessary cost, duplication or delay?

Foot Anstey invites ILM members to join us on a Legacy Voyage: an energetic, future-focused journey exploring what tomorrow's legacy administration could look like. With the help of our ABBA-inspired "AGFA" team and avatar appearances from some of the sector's best-known figures, we will unpack the key themes shaping the way charities can work better together: collaboration, communication, cost-efficiency and confident, consistent case management.

Expect insight, humour, music... and a forward-looking conversation about how we can lead the sector into the future, together.



COFFEE BREAK AND DEMO ROOMS

15:30 - 16:05

SESSION SEVEN DRINKS SPONSOR - HAMMER PRICE HOMES

16:05 - 16:25

CLOSING REMARKS

16:25 - 16:55

James Stebbings, ILM Chair

DRINKS RECEPTION

17:00 - 19:00