

Learn.
Connect.
Succeed.



Join ILM today for access to industry expertise, professional networks, courses, free training, guidance and support, advocacy and more



THE INSTITUTE
OF LEGACY
MANAGEMENT

Maximise your legacy potential

Legacy income is a vital source of funding for charitable organisations, and it is more important than ever for these organisations to maximise the full potential of gifts in wills.

Raising over £3 billion every year, gifts in wills are the largest source of voluntary income in the UK and are vital in keeping so many charitable services running. And with charitable bequests set to rise by 23% in the next decade, and legacy income set to double by 2050, it is more important than ever to ensure you have the skills, knowledge and support to maximise the potential of legacy gifts.

How we can help

If your organisation receives legacies of any size, you can benefit from membership of ILM and our expert training.

We are the only professional body for those involved in managing legacy income, and our training and support has helped hundreds of charities and other organisations across the UK.



“ILM has been invaluable for my progression within the legacy sector, and I owe a huge debt of gratitude to ILM for the excellent training”

ILM Member

Join the ILM family

Membership of ILM is £120 per year, and comes with a wide range of benefits including support, networking, free training and more...

- Exclusive access to free webinars and CPD-accredited training
- Discounted training and professional development
- Access to CiCLA – the UK's only accredited legacy qualification, delivered in partnership with the University of Law
- Members-only online content such as legal updates and factsheets
- Regular Special Interest Group meetings
- Email job alerts
- E-newsletters and industry updates
- Access to the knowledge and expertise of staff and partners
- Opportunities to network with legacy professionals and experts
- Specialist advice and support

Find out more at
legacymanagement.org.uk/membership



*“My membership of ILM is great value for money,
providing excellent content and support.
The community and resources are excellent.”*

ILM Member



Online learning Core Knowledge

Our Core Knowledge modular training system has been developed to help those who are new to legacies, as well as those who need a refresher in specific areas that are vital to their role.

Whether you're looking to keep up with best practice or want to boost your knowledge, our short courses are an accessible way to learn in your own time, at your own pace. Our courses are open to everyone, including non-members, no matter what level of experience you might have. ILM members benefit from a discount on all modules.

Our courses include:

- Forecasting Legacy Income
- Accruals for Legacy Income
- Developing a Legacy Fundraising Strategy
- Property Sales
- The Probate Process

Find out more at
legacymanagement.org.uk/training



*“The system is easy to use, looks good visually
and is very user-friendly”*

Core Knowledge student, August 2020

Online learning *Essentials Training*

Our Legacy Essentials training has been undertaken by hundreds of students, and is now offered online and is fully interactive.

There are two courses available - Legacy Essentials and Advanced Essentials - and both courses are run online over two days.

Course modules are taught by a range of leading industry experts, with the opportunity for delegates to ask questions throughout the sessions. Video recordings of the sessions are also made available at no extra charge.

The training is the ideal opportunity for anyone who works in legacies to learn all they need to know about the full legacy administration process.

Essentials training is open to ILM members at a discounted rate, as well as to non-members.

Find out more at
legacymanagement.org.uk/training



“I found the speakers really engaging and they explained everything clearly with plenty of opportunity to ask questions”

Legacy Essentials student, October 2020

A network of training and support

The support ILM members receive from other legacy professionals, ILM staff and our corporate partners is invaluable.

We are always here to offer specialist help and advice, and our corporate partners are also on hand to guide and advise our members.

Our partners are from top law firms based across the UK and in Spain, alongside property experts, market analysts, consultants and more. They are always available to offer their support to ILM members.

Free webinars

Our partners also run free webinars and masterclasses throughout the year exclusively for ILM members. These events cover a wide range of topics and feature updates and advice for all members. As the events are live, members also have the chance to ask questions of our expert presenters.



“Webinars have been thoroughly informative and a great easy way to keep up to date. Thank you so much ILM!”

ILM Member

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Learning from others

We make sure our members stay connected and have the opportunity to network both online and in person.

Our Special Interest Groups give members the chance to discuss burning issues with our friendly community of like-minded legacy professionals - there is always someone who has been in your situation and can offer their support and guidance.

Members also have access to online forums where they can share ideas, discuss issues and ask questions of other members and our corporate partners. Our regular newsletters feature news, articles and opinion pieces from legacy professionals and ensure our members keep up with the latest laws, legislation and developments within the industry.

Email job alerts ensure members are the first to know about any new vacancies.

And the ILM team is always on hand to offer guidance, support and help.



The network has been the most important part of being an ILM member. It's so helpful talking with colleagues who have dealt with similar situations.

ILM Member



ILM Annual Conference

Our annual conference is the biggest event in the legacy calendar and includes legal updates and a range of sessions relevant to legacy professionals across all charity sectors.

The conference is attended by up to 300 charity members, corporate partners and other key industry figures in a fantastic venue in central London. It is the ideal place to come together to learn and connect with others in the industry.

ILM members benefit from discounted tickets to the conference, as well as the chance to snap up limited Early Bird tickets.

With a wide range of sessions, speakers and exhibitors, many opportunities to network, and topped off with a well-attended drinks reception, the ILM annual conference is a truly unmissable event in the legacy calendar.



***“ The best conference I have been to!
A brilliant day, thank you.
Fantastic, extremely well organised and informative.
”***
Conference delegates, May 2019