



THE INSTITUTE  
OF LEGACY  
MANAGEMENT

# Training brochure



- ▷ Online Training Programme
- ▷ Essentials Courses
- ▷ Certificate in Legacy Administration (CiCLA)
- ▷ Online Events

# Introduction

The ILM Training Programme provides a complete programme of courses covering every aspect of legacy management, delivered in the way that works best for you



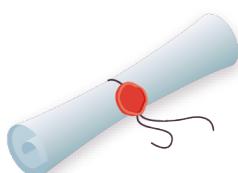
## Online Training Programme

Select modules to help you thrive in your career, whether you are new to legacy management or need a refresher in certain vital areas



## Essentials Courses

Study online with a small group of like-minded students, taught by a range of professionals in their field



## Certificate in Legacy Administration

Known as CiCLA, this is the UK's only accredited legacy qualification, produced in association with the University of Law



## Online Events

Our interactive live online events cover news, opinion and topical developments relevant to legacy professionals

# Online Training Programme

Learn at a pace that suits you with training modules covering every aspect of legacy management

Students will be able to select which modules they would like to take to help them in their career – whether it is something they are learning from scratch, a quick refresher on one aspect of legacy management or just something new they would like to learn.

Each course offers extensive content written by a professional in their field, alongside printable course notes and a quick reference guide. Most modules are also accompanied by a supporting video presented by the course author.

All our courses are assessed via multiple choice questions and a short written exercise. Students receive a certificate upon completion.

Read on for a full list of available courses...



# Online Training Programme



Available courses include...

- Accounting for Income from Legacies
- An Introduction to the Probate Process
- Breaking Trusts
- Capital Gains Tax
- Delegated Authorities
- Developing a Legacy Fundraising Strategy
- Ex Gratia Payments
- Forecasting Legacy Income
- Free Will Schemes
- Identifying and Dealing with Pre-Death Fraud
- Income Tax and the Administration of Estates
- Inheritance Tax
- Instructing Solicitors
- International and Cross-Border Legacies
- Legacies and the Code of Fundraising Practice
- Life Interest Trusts Holding Real Property
- Managing a Legacy Team
- Property Valuations, S119 and Appropriation
- Proprietary Estoppel
- Spanish Probate
- Wills Act 1837
- Undue Influence
- Want of Knowledge and Approval



# Legacy Essentials

Run by experts in their fields, Essentials online training offers a comprehensive introduction to all aspects of legacy management

## Essentials 1

Our ever-popular Legacy Essentials training course is now run completely online, offering delegates the opportunity to interact both with each other and with the expert presenters.

Delegates are encouraged to ask questions throughout the training, which is run over two days.

The course covers a wide range of topics essential to all legacy professionals, including:

- Types of Bequest
- Requirements for a Valid Will
- Claims Against an Estate
- PR, Ethics and Ex-Gratia Payments
- Probate Law
- Inheritance Tax

## Advanced Essentials

Coming soon ....





# Certificate in Legacy Administration (CiCLA)

Accredited by the University of Law, CiCLA is the only legacy administration qualification

Delivered in partnership with the University of Law, CiCLA gives legacy professionals a real advantage in their career and helps organisations manage their legacy income more effectively.

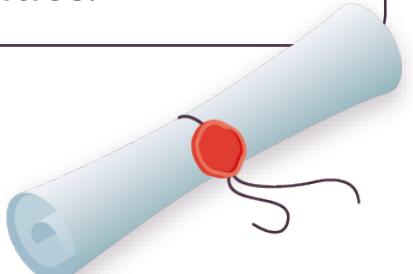
## CiCLA gives you...

**Flexibility** – CiCLA is a distance-learning course so can be taken at your own pace in your own time, and fitted around a busy schedule

**Course materials** – a comprehensive pack of materials and self-assessment tools to help evaluate your learning as you go and set the work in a practical context.

**Professional recognition** – the qualification is an approved standard of achievement recognised by employers, increasing your career progression opportunities.

Find out much more at  
[legacymanagement.org.uk/cicla](http://legacymanagement.org.uk/cicla)





# Online events

ILM members benefit from regular online training, including free webinars and surgeries presented by experts in their field

We run a series of free webinars and surgeries throughout the year, covering topics of interest and relevance to all members.

The training is delivered by an ILM Corporate Partner or outside expert, and attendees also get the opportunity to ask questions before and during the live events.

These events are an opportunity to keep up to date with the latest developments in legacy administration.

We also run regular in-depth online seminars, with several presenters giving a broad overview of a current topical issue such as digital Wills, property sales or fraud.

These online events all offer CPD points and are recorded for members to access via our website after the event.

