

## ILM Virtual Essentials – AGENDA

### DAY 1

#### SESSION 1 – 9.30-10.30am

##### **Charitable Legacy Giving and the Work of a Legacy Officer**

This session will teach a broad understanding of the role of legacies in funding the charitable sector, the likely future of legacy income, and the role a legacy officer plays within their charity.

#### SESSION 2 – 11am-12pm

##### **The Different Types of Bequest**

This session will teach the different kinds of bequests a charity can receive, how to recognise them, and their key features.

#### SESSION 3 – 1pm-2pm

##### **The Requirements for a Valid Will**

This session will teach the requirements for making a valid will, and what can cause a will to be invalid.

#### SESSION 4 – 2.30pm-3.30pm

##### **Reading a Will**

This session will look at and analyse a number of wills, so that students can apply the information they have learnt so far in practice.

#### SESSION 5 – 4pm-5pm

##### **Claims Against an Estate**

This session will teach the different types of claims that can be made against an estate, and gives some basic guidance about instructing solicitors to deal with them.

### DAY 2

#### SESSION 6 – 9.30am-10.30am

##### **Public Relations, Ethics and Ex-Gratia Payments**

This session will cover approaches to the challenging ethical issues that can arise when dealing with legacies, including how to balance your charity's public image with the duty you have to maximise income, and the legal basis for making payments to family members and members of the public.

#### SESSION 7 – 11am-12pm

##### **Managing Legacy Cases**

This session looks at the day to day work of a legacy officer, including case reviews, dealing with executors, appropriation of shares and property, S119 reports and maximising property value and estate accounts.

#### SESSION 8 – 1pm-2pm

##### **Key Cases (taught by Barny Croft of Ashfords LLP)**

Taught by one of ILM's Corporate Partners, this session will introduce students to the key cases that shaped probate law.

#### SESSION 9 – 2.30-3.30pm

##### **Basic Inheritance Tax (taught by Richard Honey of Charles Russell Speechlys LLP)**

This session will teach the basic principles of Inheritance Tax, including charitable exemptions.

#### SESSION 10 – 4pm-5pm

##### **Bringing it all together**

Taught by an experienced ILM member, this session will introduce students to the practicalities of working as a legacy officer, including dealing with the public, resolving difficult cases, and dealing with internal stakeholders.