

ILM Virtual Essentials – AGENDA

DAY 1

SESSION 1 – 9.30am-10.45am

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

Claims Against an Estate (taught by Roman Kubiak TEP of Hugh James)

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.

SESSION 4 – 2:30pm-3:30pm

The Requirements for a Valid Will (taught by Jess Ventham of Stone King)

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

SESSION 5 – 4pm - 5pm

Reading a Will (taught by Jess Ventham of Stone King)

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.

DAY 2

SESSION 6 – 9.15am-10.45am

Public Relations, Ethics & Ex-Gratia Payments (taught by Lisa Benham of Michelmores)

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 (taught by an experienced ILM charity member)

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 Sasha Wicks and Rebecca Middleton of Ashfords)

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

SESSION 9 – 2.30-4:00pm

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 – 4:30pm-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.