

## Legacy Management for Small Charities and Teams – Two-Day Training Course Agenda

### DAY 1

#### SESSION 1 – 9.30-10.30am

##### Property Law, including S119 Reports

Covering property law as it applies to charities, this session will enable you to ensure that you are complying with the rules and securing the tax reliefs you are entitled to.

#### SESSION 2 – 11am-12pm

##### Maximising Property Value

This practical session will look at the different ways of selling property and show you how to make the right choice and ensure that you are achieving the best possible price for the properties you are left.

#### SESSION 3 – 1pm-2pm

##### Delegated Authorities

Legacy Officers are often exercising powers delegated to them by their Trustees. This session will explore the limitations of these powers, and show you how to ensure that you are operating efficiently and within the law.

#### SESSION 4 – 2.30pm-3.30pm

##### Instructing Solicitors

All legacy officers will have to instruct solicitors at some point in their career. This session will show you how to do it well, saving on costs and making it more likely that you will achieve the outcome you want.

#### SESSION 5 – 4pm-5pm

##### Practitioner Perspective

Led by an experienced legacy manager, this session will bring together everything you have learnt on the first day, give you the opportunity to explore how these challenges have been managed in real life situations, and give you the opportunity to ask questions.

### DAY 2

#### SESSION 1 – 9.30am-10.30am

##### Scotland, Northern Ireland and EU Probate law

Scotland, Northern Ireland, and European jurisdictions all operate very different legal systems, with key differences from England and Wales. This session will give you an understanding of the differences, and show you how to manage cross-border legacies.

#### SESSION 2 – 11am-12pm

##### Life Interest Legacies

Life Interest (known as reversionary) legacies pose particular challenges for legacy officers. This session will introduce the key elements of trust law as it applies to reversionary legacies, and shows you how to effectively manage your entitlement.

#### SESSION 3 – 1pm-2pm

##### Forecasting Legacy Income

Forecasting legacy income is a key skill for legacy officers. Accurate forecasting provides reassurance for senior managers and trustees, and makes a legacy officers life easier. This session will show you how to forecast your income, using both internal and external information.

#### SESSION 4 – 2.30-3.30pm

##### Accounting for Income from Legacies

Legacy income is governed by strict accounting rules, known as the SORP (Statement of Recommended Practice). This course will explain the rules and explore the approaches you can take to complying with them, enabling you to pick the route that best suits your charity.

#### SESSION 5 – 4pm-5pm

##### Practitioner Perspective

Led by an experienced legacy manager, this session will bring together everything you have learnt on the course, give you the opportunity to explore how these challenges have been managed in real life situations, and give you the opportunity to ask questions.