|  |  |
| --- | --- |
| **Job Title:** | **Legacy Case Executive** |
| **Reporting to:** | **Legacy Marketing Manager** | **Job Band:** | **Band 4** |
| **Directorate** | **Community Engagement Network** | **Team** | **Fundraising** |
| **Direct Reports:** | **0** |  |  |
|  |
| **Job Summary** |
| The role will lead on all operational aspects of legacy administration and case management. The role involves ensuring the efficient and accurate processing of legacy gifts. The role will ensure the best outcome for the charity financially whilst protecting St John Ambulance’s reputation from negative sentiment. The role requires close working with colleagues in Finance and Legal to ensure the income stream is recorded accurately and delivered in a prompt manner to meet the organisation’s charitable objectives |



|  |
| --- |
| **Key Responsibilities** |
| * Managing all legacies St John Ambulance receives in line with policy and best practice.
* Ensure legacy income to St John Ambulance is protected and maximised through review of cases and estate accounts and by monitoring legal and administration costs.
* Managing and maintaining excellent communication with solicitors, lay executors, supporters and other third parties such as the supplier of the legacy database, First Class.
* Work closely with the Legacy Marketing Manager and Finance to deliver reporting of anticipated legacy income and to update on any changes or movement.
* Lead on updating processes and advise on changes to policy to ensure St John Ambulance administration of legacies is compliant and in line with best practise.
* Maintain and update records on First Class and Dynamics 365 and work with the Database team on ensuring management information is accurate.
* Oversee contentious and high value cases, taking third party advice when required, and referring decisions to senior colleagues where appropriate.
* Work closely with the Finance team to ensure records meet SORP requirements for accruals and there is a compliant audit trail for all legacies.
* Assist with multi-year forecasting of legacies and update processes to support improvements in this area.
* Offer expertise on a range of topics including Inheritance and Capital Gains Tax, Will Trusts, Ex Gratia payments and more general probate matters.
* Ensure restrictions are accurately recorded and relevant advice is given to Finance and relevant operational departments on the requirements for expenditure.
* Leading on a programme of recognition for those who leave legacies ensuring that there is positive engagement with the friends and family of legators.
* Keep up to date with the latest guidance from the Fundraising Regulator, Charity Commission, Institute of Legacy Management and relevant data protection legislation.
* Perform any other duties commensurate with these responsibilities, the band of the post and skills and qualifications of the post-holder
 |

|  |
| --- |
| **Important things you need to know about this job** |
| * Be willing to travel and work out of normal office hours when required.
* Be passionate about the work of St John Ambulance
* Take charge of your own CPD and ongoing learning.
 |

|  |
| --- |
| **Our Values and Commitment to Equality, Diversity and Inclusion** |
| * Our Values spell HEART which stands for Humanity, Excellence, Accountability, Responsiveness and Teamwork.
* Everyone who works at St John needs to be familiar with the HEART values and exemplify them.
* We are committed to being an organisation that is inclusive and welcoming of individual differences while championing equality of treatment and opportunity.
 |

**Person specification**

This is a specification of the experience, skills etc. that are required to effectively carry out the duties and responsibilities of the post (as outlined in the job description) and forms the basis for selection.

|  |  |  |
| --- | --- | --- |
| **Requirements** | **Essential** | **Desirable** |
| **Education and Qualifications** |
| Educated to GCSE level or equivalent (Grade C / 4) including Maths & English, minimum 5 | ü |  |
| A relevant legacy or probate law qualification including Certificate in Charity Legacy Administration (CiCLA) and/or STEP |  | ü |
| **Experience** |
| Relevant experience in Charity Legacy or Estate Administration  | ü |  |
| Working with a variety of specialist teams across an organisation such as Legal & Finance | ü |  |
| Experience of using databases such as Dynamics 365 and Microsoft Office applications such as Outlook, Word and Excel. | ü |  |
| Management of key external stakeholders such as solicitors, lay executors and auditors | ü |  |
| Working under pressure, meeting multiple deadlines and achieving solutions | ü |  |
| Experience of working independently and leading on a key area | ü |  |
| Experienced user of First Class | ü |  |
| **Skills, knowledge and abilities** |
| Ability to scrutinise and review estate accounts, section 119 reports and other relevant legal documentation. | ü |  |
| A good level of numeracy, analysis and problem solving skills. | ü |  |
| Work using your own initiative | ü |  |
| A team player who can positively contribute to and collaborate on the work of the team | ü |  |
| Excellent communication skills both in person and in writing with the ability to build relationships. | ü |  |
| Highly computer literate with skills including Microsoft Office and databases. | ü |  |
| Knowledge of Fundraising Regulator, Charity Commission, ILM guidance and Data Protection and Probate legislation. | ü |  |
| Knowledge of financial legacy forecasting |  | ü |
| Be willing and able to exemplify the HEART values | ü |  |
| **DBS Requirement** | **Yes** | **No** |
| Does the role require a DBS check to be carried out to be successful for the role  |  | ü |

|  |
| --- |
| This job description is intended as an outline indicator of general areas of activity and will be amended in light of the changing needs of St John Ambulance. It is expected that the post holder will be as positive and flexible as possible in using this document as a framework. |
| Initials: LR | Date of preparation: 31/03/25 |
| Job Approved Date: 31/03/25] |  |
| Ref: JDPS Legacy Case Executive |  |