Legacy administration services

Legacies are an important income stream for charities, and it is vital to have a legacy function in place at all times.

Our dedicated legacy administration team are friendly, approachable and advise charities of all sizes. We're here to offer administrative support to your legacy team, as well as expert legal advice on complex technical matters when you need it.

We ensure that your charity receives all legacy income due and that your supporters' wishes are carried out.

What we do

We pride ourselves on offering straight-forward, easy to understand advice. We can advise on all aspects of legacy administration, including:

- **Day to day legacy administration** – We can handle the administration of a gift from beginning to end. From initial notification of a gift and liaising with executors, through to thoroughly checking final estate accounts to ensure your charity complies with Charity Commission guidance.
- **Complex gifts** – We often advise on difficult estate matters, and offer pro-active advice to unlock those estates so that your charity receives its gift as swiftly and smoothly as possible.
- **Legacy forecasting & budgeting** – We work with you to review your anticipated legacy pipeline and quantify the potential value of gifts due, helping you prepare your budgets and plan for the future. We also offer financial year-end support, including the creation of year-end legacy income reports for trustees and audit purposes.
- **Team training** – We provide bespoke in-person and virtual training programmes that are accessible and relevant to the various teams in your charity, from your legacy and fundraising team to your senior management and trustees.

Who we do it for?

We're truly passionate about helping charities achieve their aims. We work with charities of all sizes on their legacy administration and management, from large national charities with in-house legacies teams, to smaller, regional organisations who require outsourced support.

We offer...

Fully outsourced legacies management solutions

Ad-hoc support for your existing in-house team

One-off project consultancy services

Helpline solutions

What makes us different?

- Our team is made up of STEP and SFE qualified solicitors – this means we can identify issues and resolve them quickly, explain the legal jargon written in wills and trusts, as well as answer complex tax and accounts queries.
- We provide regular updates regarding the legal administrative process and are always on hand to support and guide you. whilst offering practical tips on potential donor stewardship opportunities.
- We offer a range of cost-effective, flexible support packages designed to give you and your charity real value for money.
- Whether you need a fully outsourced legacy function, ad-hoc advice for your in-house team, or urgent assistance on a complex case, our team are just a phone call away.
- As a full service law firm we can also offer legal advice on a broad range of matters, including legacy and trust disputes, estate administration, disposals of land and property, charity law, governance and compliance.

Contact:

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