



 **SHAKESPEARE
MARTINEAU**
Legal advice for life and business

Legacy Loop Live

Charities Legacy Conference

London

22 June 2023

09:30 - 16:00



Legacy Loop Live Programme

The challenges for legacy teams are complex and varied. It is therefore important for those teams to have the necessary skills to navigate those challenges successfully. These sessions provide an opportunity for a variety of organisations to share their experiences and best practices.

At this conference, we will discuss leadership and resilience, provide an update on the latest case law and explore the role of stewardship in a post-Covid world.

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Agenda

- 09:30 Registration and refreshments
- 10:00 Welcome to Battersea
- 10:05 Introduction
- 10:15 Leadership and resilience
- 10:45 Having challenging conversations
- 12:15 Networking lunch
- 13:00 Visit from Battersea dogs
- 13:15 An update on contentious cases
- 14:00 Stewardship in a post-Covid world
- 14:45 Ask the experts
- 15:30 Networking drinks
- 16:00 Close



Leadership and resilience

The challenges for operating organisations, hybrid working, and pressures have escalated in the last few years and this is especially true for the legacies and charities sector.

In this session, we will share experiences and strategies for developing emotional intelligence and adapting to change, and also how leaders can inspire, motivate and empower their teams to excel even in most difficult and sensitive situations.

We will also share our insights of being a B-Corp organisation, highlighting the importance of ethical leadership and responsible business practices in the charity sector.



Sarah Walker-Smith
Chief Executive Officer
Shakespeare Martineau

Having challenging conversations

Building strong relationships is essential to success in the charity and legacy sector, but it can be particularly challenging when dealing with sensitive matters such as executors of a deceased's estate, grieving families and family disputes.

Understanding how to navigate these relationships is crucial to achieving amicable solutions for clients.

In this session, Adam will explore how to deal with challenging conversations for legacy professionals whether with lay executors, bereaved family members, solicitors, colleagues and even with the charity trustees and how to work in a high emotion environment. He will look at some real life examples and case studies and provide some practical tips about to handle such situations.



Adam Carvalho
The Carvalho Consultancy

An update on contentious cases

In the session, we will explore the latest developments in contentious trusts and probate, the themes of these cases and some of the decisions we expect to see over the next few months and years.



Debra Burton
Partner
Shakespeare Martineau



Andrew Wilkinson
Partner and Head of Legacies
Shakespeare Martineau

Stewardship in a post-Covid world

How has the role of legacy officers evolved in the wake of Covid? Throughout the pandemic and coming out of the other side, we will examine the unique challenges that these officers are facing and the opportunities that they have to make a meaningful impact in the charities they serve.

Our expert speakers will discuss the importance of building and maintaining strong relationships with donors, and share practical examples of how they work to maximize legacy gifts.

Attendees will come away from this session with a deeper understanding of the critical importance of stewardship in today's challenging fundraising environment, and practical strategies for improving their own stewardship practices.



Andrew Wilkinson
Partner and Head of
Legacies
Shakespeare Martineau



Gaynor Lanceley
Head of Legacy
Administration
Shakespeare Martineau



Bethany Dowell
Legacy Officer
Battersea Dogs & Cats
Home

Ask the experts

Our panel of experts will share their wealth of knowledge, insight and experience with you on the issues that are top of your minds.

Please come prepared with your questions, so we can together have a better understanding of how we make a real difference to the legacy sector.

How to book

Who should attend

Legacy professionals

Venue

Battersea Dogs & Cats Home
4 Battersea Park Road
Nine Elms
London
SW8 4AA

Date and time

22 June 2023
09:30 - 16:00

Cost

There is no cost for attending this event.

Sustainability

We have made careful considerations to reduce the environmental impact of this event by working with venues and suppliers that help us lower the environmental impact of our events, avoiding single-use plastics and maximising the use of digital communications to limit printed materials. We will also collect and re-use our badges given out at this event.

For more information about this event, please email us at events@shma.co.uk or contact:

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Marketing Events Manager
07734327821

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