Legacy Link
Part of Legacy Futures

Maximise your gifts in wills income

The UK's leading legacy administration consultancy

We provide outsourced legacy administration support to over 115 charities in the UK, from the long established to the newly emerging. Since 2006 we have been helping charities secure their legacy income through the estate administration process. Now, as part of Legacy Futures, we are an integral trusted partner to the sector, continuing to help charities grow their legacy income and secure their futures.

2006

From the long established to the newly emerging since 2006

115

Working with over 115 charities a month

£200m

Securing over £200m in legacy income per year

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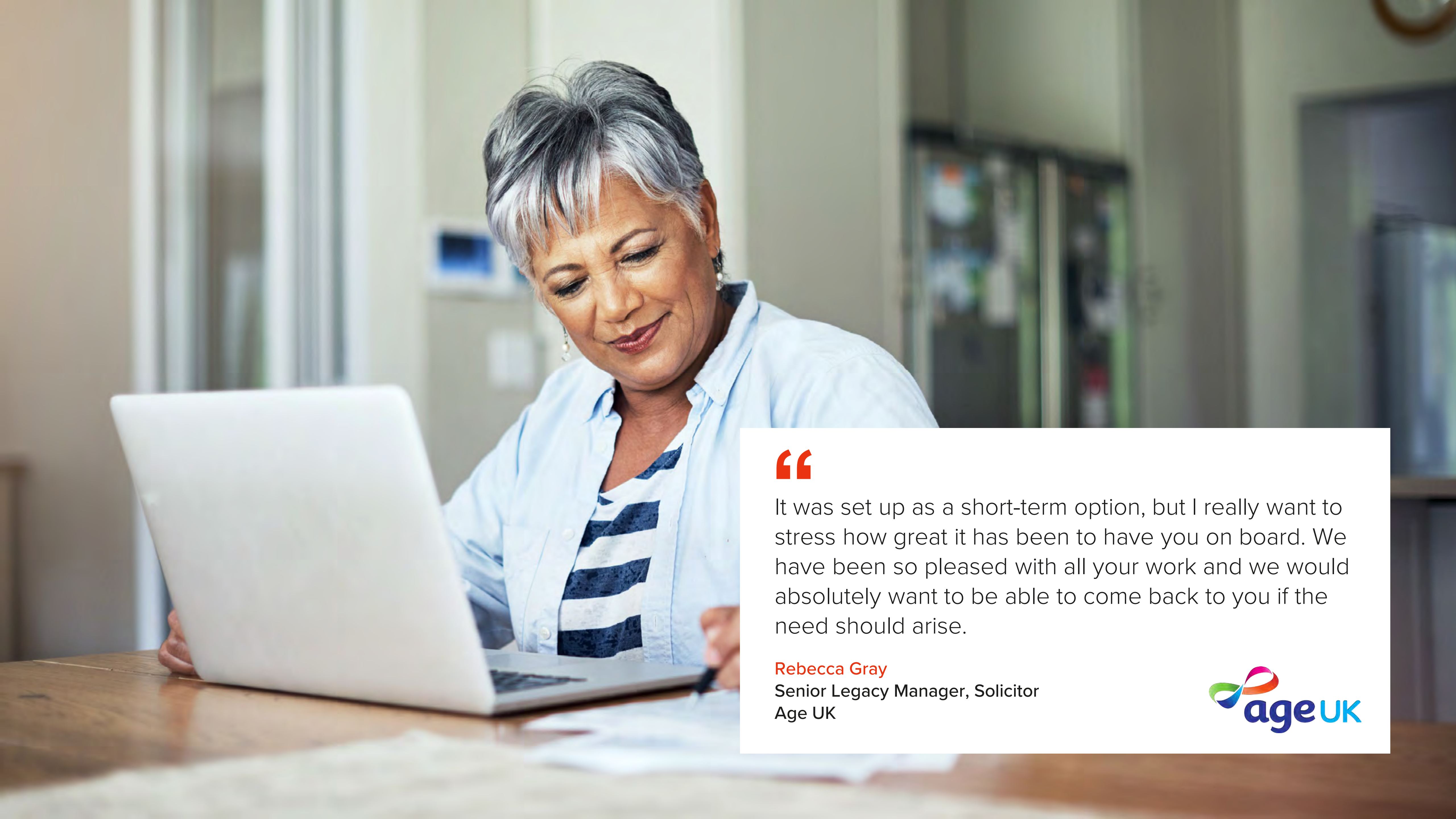


“It was set up as a short-term option, but I really want to stress how great it has been to have you on board. We have been so pleased with all your work and we would absolutely want to be able to come back to you if the need should arise.

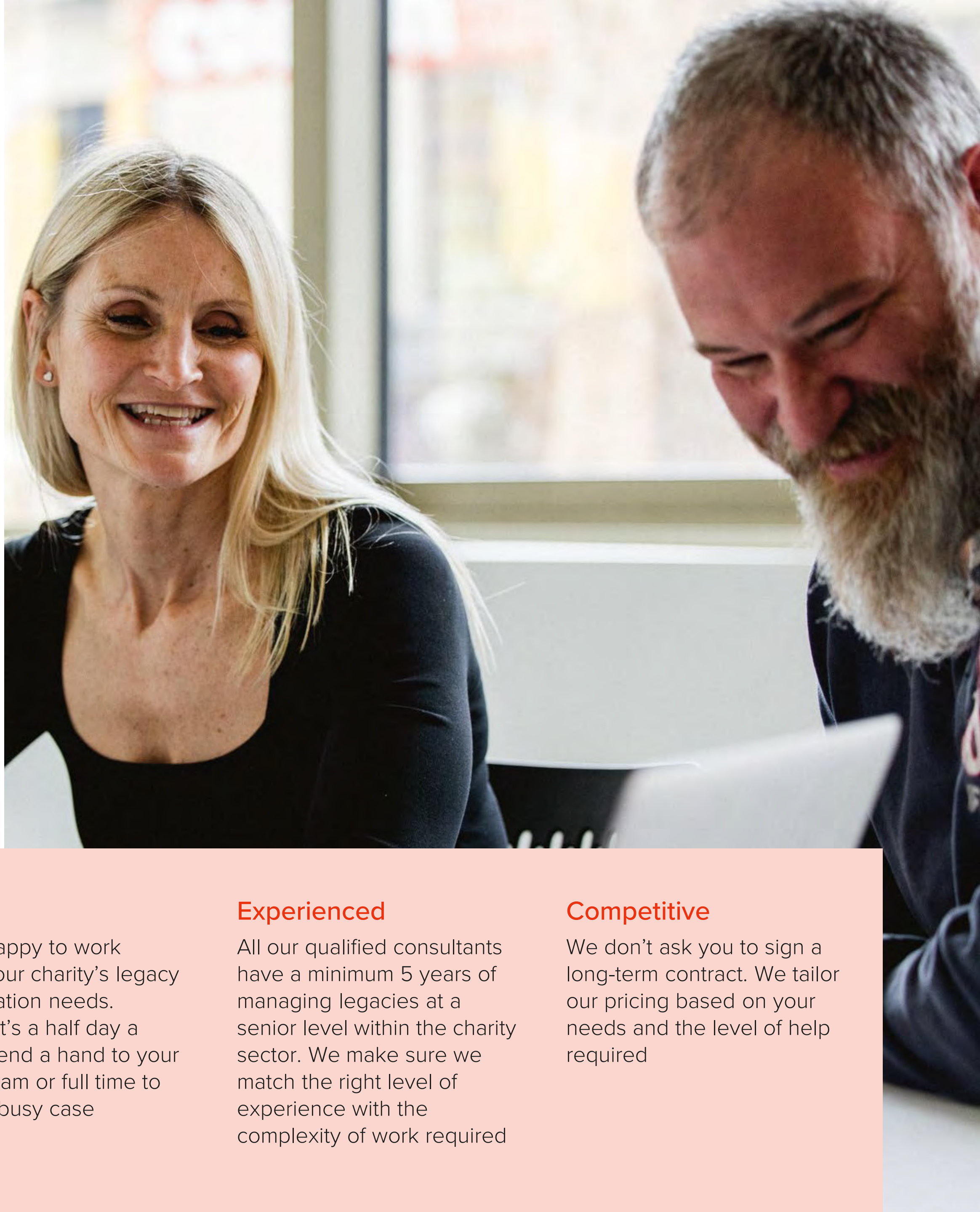
Rebecca Gray
Senior Legacy Manager, Solicitor
Age UK

Our experience is unrivalled

In times of uncertainty legacies provide a vital source of income to many charities across the UK. With legacy income set to double In real terms over the next 10 year it is essential that this is safeguarded.

Our legacies team is unrivalled in experience and are on hand to ensure that your legacy donor's final wishes are realised and that they have the greatest impact for your charity.

We can help you navigate the complexities of the estate administration process, from notification of a gift, through to distribution of the estate. Our experience means we are able to communicate with executors in a respectful and sensitive way, while making sure your interests are represented. We thrive on working quickly and adding value – so you can be confident your legacy gifts are in safe hands.



Flexible

We are happy to work around your charity's legacy administration needs. Whether it's a half day a week to lend a hand to your current team or full time to handle a busy case workload.

Experienced

All our qualified consultants have a minimum 5 years of managing legacies at a senior level within the charity sector. We make sure we match the right level of experience with the complexity of work required

Competitive

We don't ask you to sign a long-term contract. We tailor our pricing based on your needs and the level of help required

We help you create real value from your legacy income

Correcting errors in estate accounts

Challenging and reducing or capping legal fees

Negotiating better prices on property sales

Appropriating assets to reduce Capital Gains Tax and increasing the overall estate

Pursuing development potential in land

Reducing estate agent's fees

Discovering unrealised assets

Accessing favourable commission rates from agents, valuers and surveyors

Correctly allocating Inheritance Tax to ensure the charity isn't paying

Reclaiming tax through R185 forms

"During just one quarter of 2022 our amazing legacy administration consultants helped to raise over £500,000 in additional income for the charities we support through their diligence and hard work.

Neil Kirk
Managing Director
Legacy Link




Our team of 35 consultants is trusted by the sector

We are proud to have the largest and most experienced charity legacy administration team in the UK. From qualified solicitors, charity legacy officers and skilled administrators, ours have the skills and experience to be trusted with your legacy income, whatever the challenge.

Paul Browne

Paul an experienced manager with a diverse background from retail finance to scientific research in senior technical and international development roles. He is a natural communicator at all levels from executive to volunteer, able to articulate highly technical subjects to people at all levels. Paul has specialised in business process and IT systems in the past, working on several large change management projects for central government and international businesses.

Liz Parry

Liz has worked in charity legacy administration for 20 years and holds the CiCLA, is an Associate of the Chartered Institute of Legal Executives and STEP Affiliate. Liz held the position of Legacy Officer and then Legacy Administration Manager at the RNIB for 17 years before meeting her husband and moving to Somerset, where she took up the role as Legacy Manager for the National Osteoporosis Society.

Marcia Prince

Marcia immigrated from the US to the UK in 1988. She attended the College of Law, London, qualifying as a solicitor working in probate and Family Law. Marcia has been working in the charity sector since 2001, leading legacy administration and legacy marketing teams for National Trust, then the legacy administration team at Salvation Army.

Naomi Orrey

Naomi is an experienced legacy officer having managed complex estates involving assets in foreign jurisdictions, contentious cases including attending mediation and both the Court of Appeal and Supreme Court. Her ability to see the bigger picture without losing sight of the detail has been invaluable in protecting and enhancing charity legacies and reputation.

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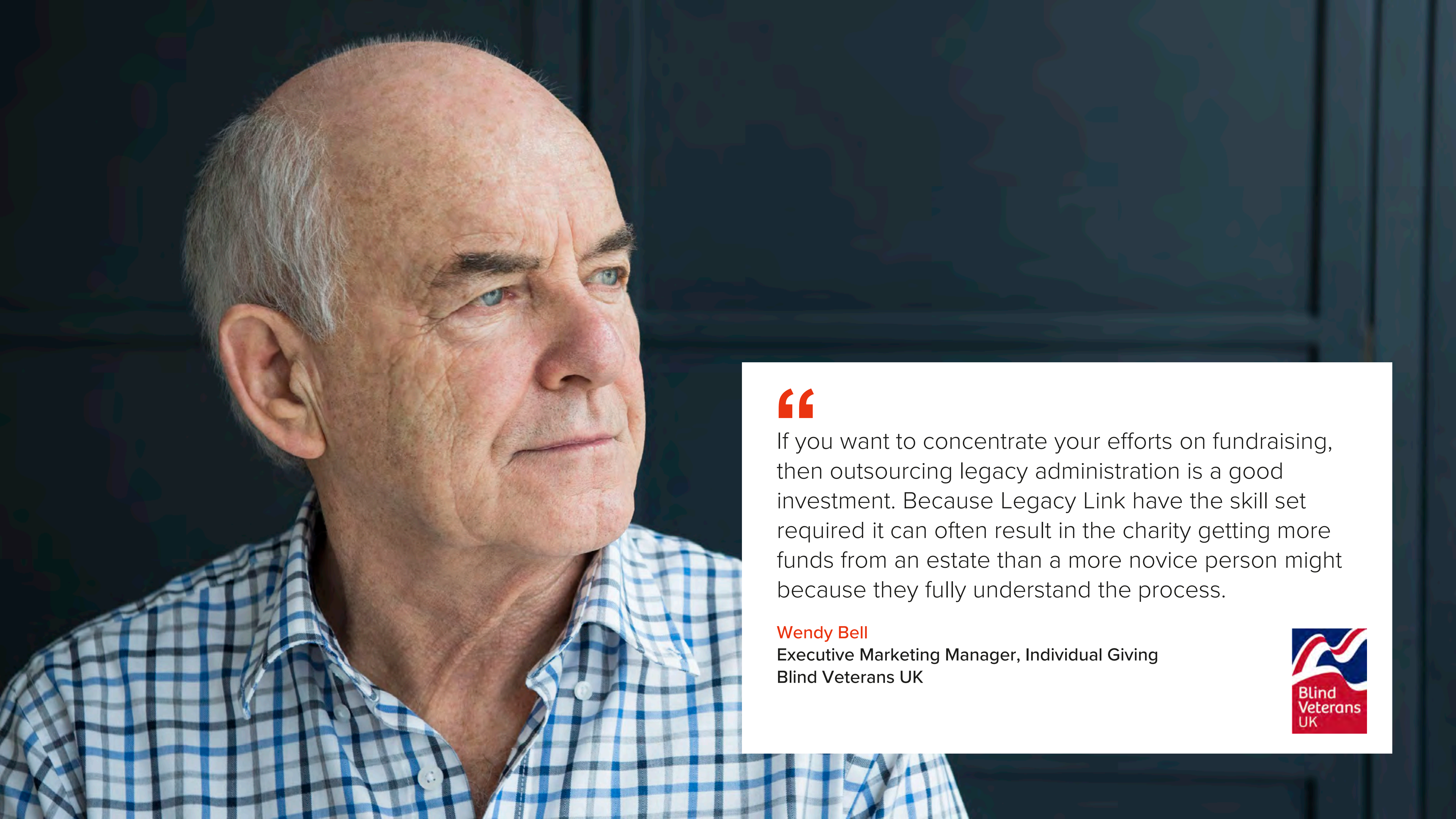
Across every sector and every shape and size of charity



“If you want to concentrate your efforts on fundraising, then outsourcing legacy administration is a good investment. Because Legacy Link have the skill set required it can often result in the charity getting more funds from an estate than a more novice person might because they fully understand the process.

Wendy Bell
Executive Marketing Manager, Individual Giving
Blind Veterans UK

Outsourced service you can rely on

Our biggest product is Long Term Support; offering you on-going week by week management of your cases from one case to several hundred. Next to this is short-term support where we can be parachuted in to plug a temporary gap in your team, for whatever reason, and for whatever length of time.

It's personal

You get a point of contact with one of our experienced legacy consultants, to work with you and manage the full administration of your legacy income

It's flexible

There are no set up costs or monthly retainers to pay, we simply charge for the amount of work required each month within your budget

It's efficient

Our consultants can work up to 50% faster than an equivalent member of staff

You're in safe hands

Our consultants are fully qualified and indemnified for £2m, giving you peace of mind

It's cost-effective

Save valuable office space and reduce overheads

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Long Term Support

More charities than ever before are benefiting from the generosity of donors leaving a gift in their will. And with that generosity, comes responsibility on the charity's part, to ensure that gift is realised and has the biggest impact for the cause as possible.

In fact, Trustees have a personal legal responsibility under Charity Law to manage their resources responsibly, with reasonable skill and care, and in line with the charity's best interests. This role is best delegated to a skilled and experienced legacy officer, who is qualified to carry out the role.

For many charities, employing someone at this level can be unaffordable, particularly when there isn't enough case work to warrant a dedicated member of staff.

Instead, this role can often be given to members of staff who lack the training to carry out the function well, and it can expose the charity to unnecessary risk and mean they lose out on potential income.

Or for larger charities, it is increasingly difficult to find and retain the right levels of staff and to keep it cost effective. That's where Legacy Link's outsourced legacy management service can help.

Our fees

There are no upfront fees. We charge by the hour.

Senior Consultant: £64/hour

Developing Consultant: £42/hour

We can also offer fixed fees or per cases managed.

"Becky's considerable knowledge of all things legacy-related has been vital in bringing some difficult cases to a successful conclusion. I'm not quite sure how we ever managed without her!

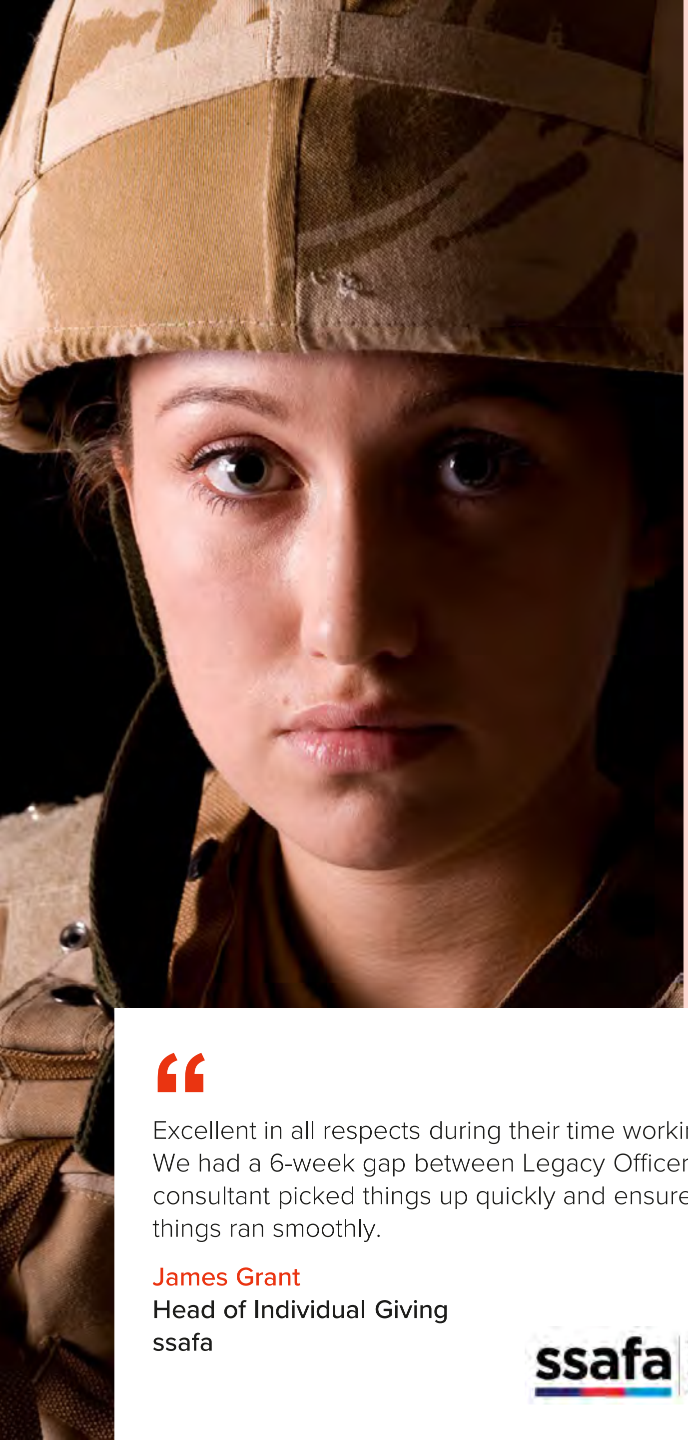
Andrew Murgett
Legacy Manager
Diabetes UK

“

Naomi was an absolute joy to work with, and we can’t praise the standard of her work highly enough. She delivered all the tangible deliverables we agreed with a calmness and diplomacy that was admirable and has helped us take huge strides forward (both practically and culturally) within a relatively short timescale. Impressive.

Helen Hoare
Legacy Manager
National Trust

National Trust



Short Term Support

An extra pair of hands for your legacy team
when you need it most.

Occasionally you may find you have a gap in your team – a member of staff on sick leave, maternity leave, waiting for a new starter. Or you may have a backlog in work at a busy time, such as year-end or during an audit, or simply because your notifications have risen.

With a Legacy Link consultant, you can increase the capacity of your legacy team on a short-term basis, and ensure you keep your legacy income on track.

Our fees

There are no upfront fees. We charge by the hour.

Senior Consultant: £64/hour

Developing Consultant: £42/hour

We can also offer fixed fees or per cases managed.

> Excellent in all respects during their time working with us. We had a 6-week gap between Legacy Officers. Our consultant picked things up quickly and ensured that things ran smoothly.

James Grant
Head of Individual Giving
ssafa

ssafa the Armed Forces charity

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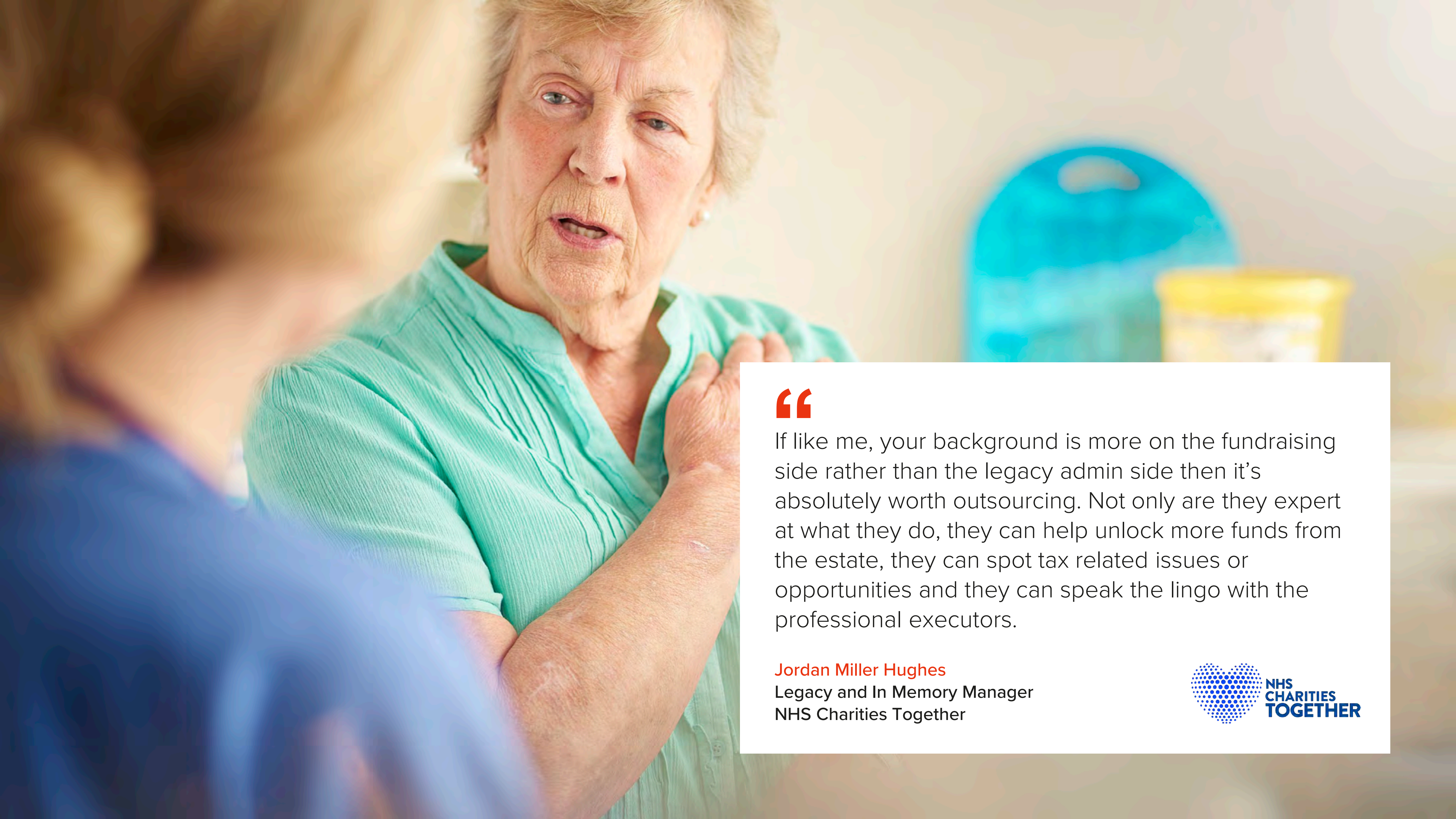


> If like me, your background is more on the fundraising side rather than the legacy admin side then it’s absolutely worth outsourcing. Not only are they expert at what they do, they can help unlock more funds from the estate, they can spot tax related issues or opportunities and they can speak the lingo with the professional executors.

Jordan Miller Hughes
Legacy and In Memory Manager
NHS Charities Together

NHS CHARITIES TOGETHER

Other services to support your legacy administration

Legacy Helpdesk for ad hoc legacy admin support

Legacy Administration Healthcheck to review your legacy gifts

Legacy dashboard for real-time data on your legacy income

Legacy Helpdesk for ad hoc legacy admin support

Our team of friendly and highly experienced legacy consultants are on hand and available to help 9am-5.30pm Monday to Friday.

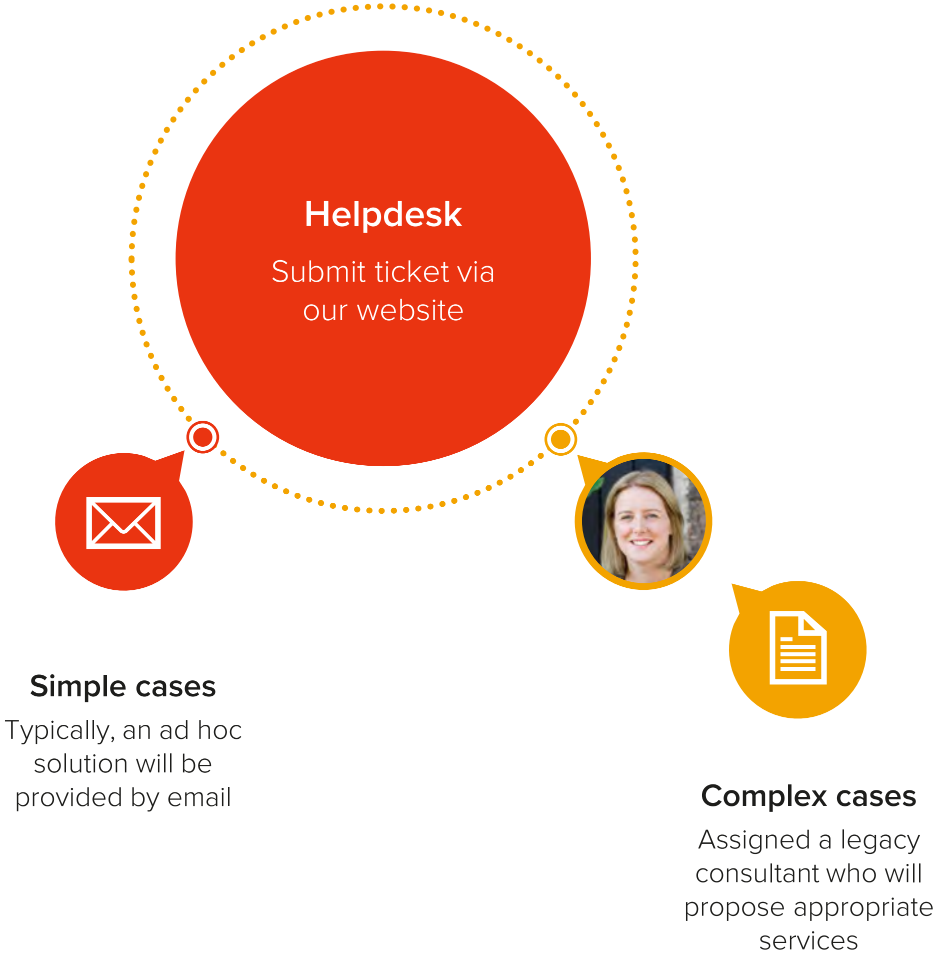
Simply submit a ticket to the Helpdesk for one of our consultants to review your question and send you an initial response within 24 hours. We will send you a time estimate for the work you require, await your approval and then get straight to work.

Benefits to you

- A quick answer to your questions.
- Help to draft responses for executor or solicitor correspondence.
- Reviewing estate accounts.
- Complete inheritance tax calculations.
- Carry out reversionary interest reviews.

Cost: £64 per hour + VAT

Quick calls are usually free but if the request is likely to take longer to resolve, then a time estimate will be provided upfront.



Legacy Administration Healthcheck to review your legacy gifts

This bespoke service provides a detailed review of how your charity manages its legacy gifts and offers recommendations on improvements to bring you in line with the latest legal requirements and sector best practice.

The Healthcheck is carried out remotely and presented as a detailed written report with recommendations for any improvements that must or could be made. The typical areas our Healthcheck covers.

Typical areas covered

- Security and risk
- Forecasting income
- Keeping on top of routine matters
- General procedures
- Review of delegated authority
- Use of database / computer systems
- Tone and frequency of communications
- SORP compliance

Cost: from £2,500 + VAT

Legacy dashboard for real-time data on your legacy income

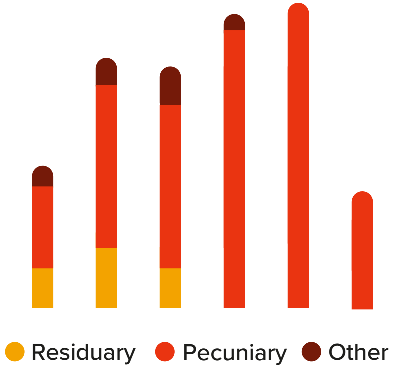
Review how your charity manages its legacy gifts. Our dashboards integrate with existing case management systems (e.g., First Class) to help you visualise and understand your legacy income pipeline at the touch of a button.

Cost: from £1,500 + VAT.

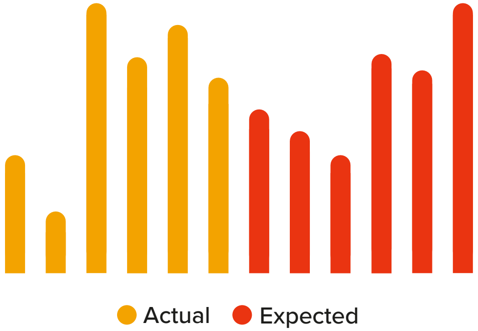
Representative examples of data provided

Live cases

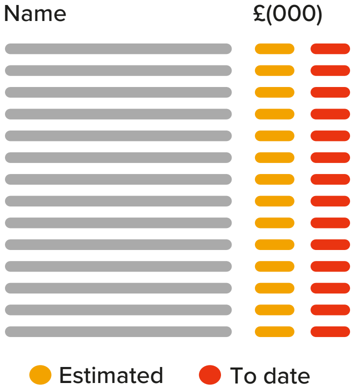
Expected Income



Current Year Projection



Top cases (income)



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Paul was absolutely brilliant! He picked up a fairly tricky caseload (and sorted out a load of issues), always offered to go above and beyond and help with people’s casework and shared First Class 4 expertise along the way. He fitted in really well with the team. He will be missed!

Donna Barclay
Head of Legacy Income
RSPCA

We're part of the Legacy Futures family

Legacy Futures

We work with charities around the world to harness the transformative power of legacy giving. We believe it's time for a new integrated approach to legacy giving, from the first connection to the final donation. To make every legacy count and secure the future of your charity.

Legacy Foresight

Insight and analysis

Benchmarking, research and forecasting in the sector to inform legacy giving strategies.

Legacy Voice

Strategy and communications

Insight and strategy into actions to transform your legacy giving potential.

Legacy Link

Estate administration

Secure and grow your income with our skilled administration consultants.

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We look forward to hearing from you

If you have any questions or would like to discuss anything further, please feel free to contact Sharon Wheeler.

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Great Place To Work®
Certified
MAY 2023-MAY 2024
UK

Prices correct as at June 2023. Please note we reserve the right to increase prices in the future.