<table>
<thead>
<tr>
<th>Position Ctrl #:</th>
<th>248</th>
<th>Job Title:</th>
<th>Legacy Officer</th>
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<tbody>
<tr>
<td>Reports To:</td>
<td>Global Legacy Director</td>
<td>Job Code::</td>
<td>UK071</td>
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<tr>
<td>Supervises/Manages:</td>
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<tr>
<td>Location:</td>
<td>IFAW UK – London</td>
<td>Department:</td>
<td>Development</td>
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<tr>
<td>Full Time or Part Time:</td>
<td>Full Time</td>
<td>Date Approved:</td>
<td>August 2020</td>
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**Job Description**

**Position Summary/ Objective**
The position is responsible for all aspects of legacy administration using the Team Approach and First Class databases. They report to the Global Legacy Director on a day-to-day basis. The purpose of the role is to liaise with executors of estates where gifts are left in Wills to IFAW, family members, with other professionals and with co-beneficiary organisations to:

- Collect in and optimise the value of legacies to IFAW, balancing the need to maximize income and enhance IFAW’s reputation.
- Represent IFAW in a positive light to the families, professionals, non-professional executors and others connected with legacies to IFAW to help support future gifts.

**Role and Responsibilities**

- Responsible for agreed residuary and pecuniary case load maximizing income to IFAW and working with the other legacy officer to ensure all procedures and requirements for administering them are followed.
- To liaise with the Director of Finance or such other Directors as may be required regarding issues such as Deeds and indemnities.
- To provide recommendations for action on any legacy case where such action needs to be sanctioned by senior management or Trustees, such as where litigation is underway, there may be a risk to the charity’s reputation or expenditure which may be greater than sanctioned for this post.
- To undertake personally the administration of more complex cases of any type which may involve contentious issues, issues regarding land, PR risks or other issues which require a high level of experience.
- To liaise regularly with the Legacy Director regarding the progress of high-value and high-risk cases and in general regarding the management of the legacy administration function.
- To liaise with the legacy fundraising and communications functions of IFAW in relation to any information or stories relating to legacies which could enhance the organisation’s future income.
- Provide relevant payable reports and information as required and maintain an efficient filing system.
- Monitor data integrity; identify problems; analyse and take corrective action, as needed.
- Maintain, track and manage payments of giving agreements and pledges on a timely basis
- Answer phone calls, e-mails, and letters from IFAW supporters, Solicitors, Executors and Suppliers in a timely manner.
- Assist with Year End reconciliation - adjustments, audit reports and case handling.
- Generate reports for LG staff.
- Receive and log departmental post when required.

**Qualifications and Education Requirements**

- Minimum 3 years legacy administration experience.
- Achieved or working to the ILM Certificate in Charitable Legacy Administration is desirable.
- Proven accounts payable experience and basic accounting procedures.
- Numerate, accurate and attentive to detail.
• Experience of working unsupervised and as part of a team.
• Experience of handling conflicting deadlines and working under pressure.
• Confident communicator, able to respond effectively to internal/external customers queries, complaints and problems - written and oral.
• Self-motivated, detail-oriented individual who possesses excellent organizational, written and communication skills; good judgment; initiative; and desire to deliver high standards of work.
• Knowledge of Database management, Intermediate/Advance level MS Office Word and Excel required.
• A general understanding of database management and fundraising in a non-profit environment is helpful. Familiarity with fundraising software or other data management software is beneficial.
• A strong commitment to quality work, customer service, high productivity, attention to detail;
• A gracious and pleasant phone manner essential.
• Strong interpersonal skills, decision-making and planning skills and the ability to work independently.

**OTHER DUTIES**
Please note this job description is not designed to cover or contain a comprehensive list of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities will change from time to time to meet the needs of the department and our company.

At IFAW, we aim to create and foster a workforce that reflects and contributes to the diverse, global community in which we work to improve the lives of both animals and people. We are dedicated to fostering justice, equity, diversity, and inclusion so we actively encourage candidates from diverse backgrounds.

**SIGNATURES**
This job description has been approved by Human Resource and reviewed by the manager and employee. Employee’s signature, below, constitutes employee’s understanding of the requirements, essential functions and duties of the position.

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<thead>
<tr>
<th>Name</th>
<th>Signature</th>
<th>Date</th>
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<tbody>
<tr>
<td>Employee</td>
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<tr>
<td>Manager</td>
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</tbody>
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Closing date for receipt of applications: Tuesday 14 September 2020

To apply, please submit CV and letter of interest to Recruitus@ifaw.org