

Writing Charity Friendly Wills

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(Institute of Legacy Management Training Team)



**6 Hours CPD
£150**

FULL Members of the IPW ONLY



**INSTITUTE OF PROFESSIONAL
WILLWRITERS**

In association with

ILM

Institute of Legacy Management

The Course will cover four distinct topics, the nature of the charity sector itself and the role legacies play within it, the problems that occur with charitable Wills dealing with Charitable Legators and the role of legacy officers. The course will be light hearted and as practical as possible, aiming to give participants a broad awareness of the issues, and the tools to deal with them in a practice setting. All delegates will receive a certificate issued by the Institute of Legacy Management.

Session one – The charity sector

- The different sectors – animal, illness, development etc
- Small charities v big charities – the pro's and con's of both
- Looking beyond the obvious causes – and how to find the smaller ones.
- Breakdown of legacy income across the sector
- Fund ratios and the cost effectiveness of legacy giving
- Residuaries v pecuniaries

Session two – Post mortem issues

- Corrupt titles, and generic terms ('cancer')
- Smee & Ford & charity practice
- What happens when names are inaccurate or there is confusion (Royal Sign Manual, cy pres, and formal arrangements)

Session three – Dealing with Charitable Legators

- The demographic profile of charitable legators, and how it differs from non-charitable legators
- The Institute Of Fundraising rules on Legacy Marketing – these are a model of what anyone dealing with potentially vulnerable legators should do
- Drafting Wills with exempt and non exempt residuary beneficiaries.

Session four – The work of Charity Legacy Officers

- The regulatory framework – the charity commission, auditors, SORP, and trustees powers and delegated authorities.
- The technical stuff (The Inheritance Tax Act 1984, showing the maximisation of asset values, CGT and appropriation, Section 36)
- Striking the balance – maximising entitlement, avoiding negative PR
- Working with Charities – supplying standard information, round robin letters, appointing a lead charity, and supplying regular updates

Delegates will be added to a directory of 'Charity Friendly' Will Writers to be compiled by ILM and posted on their website www.ilmnet.org which is accessed by over 400 ILM members who are Legacy Officers working for large & small charities.

Please book the following session(s)

Please book.....place(s) on the 17th September 2008 at Regent Hall, The Salvation Army, 275 Oxford Street, London, W1C 2DJ

Please arrive by 9.00am for 9:30am start. Finish 5.00pm

I enclose a cheque for..... payable to 'IPW'.
Please send to: **IPW, Trinity Point, New Road, Halesowen, B63 3HY**

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