

# Appointing a Parish Legacy Officer

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## Introduction

It is good practice to appoint someone to act as the main contact for legacies (also known as gifts in wills). This role involves encouraging church members to keep their wills up to date and consider the difference a gift in their will could make to their local church. You may already have a Parish Giving Officer whose role is to encourage giving, legacies and stewardship; however if the PCC wishes to appoint a separate Parish Legacy Officer, we have outlined the key roles and responsibilities below.

## Your Role

The role of a Parish Legacy Officer is to provide a friendly, supportive and confidential ear to church members and others who approach you regarding will writing and leaving a gift in their will. You do not need to have specialist legal or financial knowledge because your role is not to give advice, but to sign post individuals to further information and appropriate professionals.

## Record Keeping

It is good practice to record any meetings or conversations you have with individuals and write a brief summary, in case you need to refer to them at a later stage. Include the date, time and place and note of any actions. Keep this written record secure and confidential.

## Engaging with Solicitors

It can be helpful to contact your local solicitors and provide them with information on how an individual can leave a gift in their will to your church. They may offer to speak to your congregation about the importance of will writing and/ participate in a discount or free will writing annual event. Please remember, if you are recommending solicitor firms, always recommend a minimum of two firms and two solicitors.

## Overall Objective

### To help the parish community:

- a. Understand that writing a will as an important act of good stewardship.
- b. Encourage gifts in wills to further resource the church's mission and ministry.

## Core Tasks Include

- Encourage the PCC to make and communicate a PCC Legacy Policy.
- Understand the church's history of encouraging and receiving gifts in wills.
- Promoting legacies within the parish through circulating leaflets, producing magazine, articles, resourcing clergy and readers etc.
- Encourage your Clergy Person to preach on the importance of gifts in wills.
- Talking with an individual about a gift in their will.
- Act as the main point of contact in the parish for all legacy enquiries.
- Organising an annual event or occasion to celebrate gifts in wills.
- Ensuring the church honours and thanks the family of any legacies received.
- Being a point of contact for the parish with the Diocesan Stewardship Advisor and attending training when organised by the Diocese.

## Personal Specification

- Sensitive to people and able to maintain total personal confidentiality.
- A good listener.
- A well organised individual, used to dealing with official paperwork.
- Well respected and well liked within the church and community.
- Enthusiastic and able to motivate other people to give to God.
- Knowledge of legal and financial matters is beneficial, but not required.
- Preferably has made their own will including a charitable legacy.

## Approach

- Do not be afraid to talk about the importance of gifts in wills.
- Never disclose confidential information to a third party (including the clergy).
- Drip feeding information in a low-key manner and planned over the long term.
- Pray, Speak and Listen with love and understanding.