

Appointing a Legacy Officer

If you have any questions please contact the Christian Stewardship Officer:



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For more information about Christian stewardship, visit the stewardship pages on the Diocese of Manchester's website: www.manchester.anglican.org



Choosing a Parish Legacy Officer

Key Role:

To encourage church members to keep their wills up-to-date and consider leaving legacies to their local church and other Christian organisations. Activity should be low-key and planned over the long-term.

Main Activities:

See previous section “How the PCC can encourage...” for a wide variety of possible activities. These need to be carried out sensitively in a low-key way, and prioritised over the years.

Person Specification:

The person chosen is likely to be:

- mature with a fairly wide experience of life
- able to maintain total personal confidentiality
- a good listener, particularly with elderly people
- a well-organised individual, used to dealing with official paperwork etc (though specialised knowledge of legal and financial matters is not required)
- able to signpost enquirers to other relevant professional experts
- able to analyse potential problems into simpler parts
- probably able to travel to meet people in their own homes
- CRB checked
- probably already acted as an executor or used a power of attorney
- probably already made legacies to church and charities in their own will

Term of Office:

Probably 3 or 5 years, followed by formal review, and possible renewal.

Time Commitment:

In the first few months after appointment the initial setting up (eg research, contacting local solicitors and funeral directors, writing leaflets) may take several hours a week at times that are convenient to the jobholder.

In the medium to longer-term this is likely to reduce to only a few hours each month for each church (eg confidential visits to church members, writing items for parish magazine) with occasional periods of more intense activity (eg Legacy Sunday).

Guidelines for a Legacy Officer

You should ...

Your job is to provide a friendly, supportive and confidential ear to church members and others who approach you about wills, codicils, enduring power of attorney (EPA) etc.

If you don't know the answer to a question, say so. Suggest who might be able to answer, or say that you will go and find out without revealing who you are speaking on behalf of.

It is good practice to write up a brief summary of any meetings you hold with individual church members, solicitors etc. in case you need to refer to them at a later stage. Include the date, time and place and note of any actions you promise to undertake. Keep this written record secure and confidential.

Always provide church members with the names of at least two firms appropriate for their circumstances.

Behind making or revising wills there are often a wide range of pastoral issues – old relationships, family quarrels, regrets about past actions or failures, fears about the future. One of your roles is to be a confidante with whom such issues can be safely explored. If they arise, your job is to listen sympathetically, and avoid offering advice beyond what you are competent to do. You may want to suggest some matters are discussed with others like your clergy, Relate, Age Concern or the Citizens Advice Bureau.

You should NOT ...

Whilst it is fine to drip-feed general information about wills or legacies through magazine articles and leaflets, do not approach individuals directly. Wait for them to approach you when they are ready to discuss the matter.

Some people may not want one-to-one confidential discussions to take place in their own or your home. In that case suggest a private room in the church or hall when people are around but not able to hear your conversation.

Never make suggestions regarding the detailed contents of anyone's will. That is their solicitor's or accountant's job. Your task is to help people think through the issues and options in general terms to help them prepare for a visit to a professional. Never witness a will that mentions the parish – you or the church could be accused of undue influence.

Never disclose anything to third parties (even the clergy) that you may have been told about potential legacies. Remember that wills can get changed, and it will only take one unguarded comment to ruin your (and the church's) reputation for confidentiality.