ELA

Excellence in Legacy Administration

10th February 2026
Online Conference

Agenda

Smee&Ford | Legacy Futures

0940-1030 **Introduction and Welcome from Smee & Ford and Legacy Futures**
Suzanne Watts, Senior Producer, Smee & Ford

0930-0940 **Legacy Giving Unpacked: The Data Behind the Trends**
Mark Pincher, Head of Data, Smee & Ford
Doug Clow, Head Analyst, Legacy Futures

Smee & Ford and Legacy Futures come together to discuss and dissect what's driving donor behaviour, the latest estate values and probate timelines — and explore how the significant changes in the November Budget, along with political uncertainty, are shaping the outlook for 2026 and beyond.

1030-1045 **Break**

1045-1115 **The Multi-Tasking Legacy Manager: Simple Strategies to Grow a Sustainable Pipeline**
Matt Cove, Supporter Engagement Manager, Spinal Injuries Association

In smaller charities, legacy managers often wear many hats — marketeer, steward, storyteller, analyst, and administrator — all within one demanding role. This practical session shares some simple, achievable strategies to build or refresh your legacy fundraising approach without overwhelming your workload.

Through a real-life case study, we'll explore how to make the most of limited time, budget, and capacity while keeping impact at the heart of your work, including practical ways to integrate legacy fundraising into your existing role.

1115-1130 **Break**

1130-1210 Quick Efficiencies to Streamline Your Work as a Legacy Manager

Paul Browne, Legacy Link
Duane Saunders, Legacy Link
Marcia Prince, Legacy Link

Time poor, low on resource and being pushed to secure ever more income – sounds familiar? In this helpful session, discover how to save time and work smarter in legacy administration.

Discover clear and effective tips on using internal resources, collaborating with other charities, managing solicitors, and scheduling communications. Packed with real-world advice, solutions and shortcuts this session will help you reclaim time, save money and boost efficiency in your legacy role.

1210-1225 Break

1225-1310 Impact Reporting in Legacy Administration: Building Trust and Transparency

Emily Ding, Canal & River Trust
Lizzy Steward, Essex Wildlife Trust

Legacy administration is more than a financial process — it's a vital act of stewardship and trust between donor and charity. Each estate represents someone's values and belief in your charity's mission. This session explores how impact reporting can help legacy professionals communicate that those gifts have been honoured, showing executors, families, and colleagues that every legacy truly makes a difference.

Drawing on their experience of managing and reporting on gifts, this session will explore how clear impact reporting can strengthen relationships whilst honouring the donor's legacy, underlining the lasting value of every legacy gift.

1310-1400 Lunch Break

1400-1440 **Realistic Expectations: How to get Great Results from Property Gifts**

Dan Marsden, Probate Auction

Property gifts can be some of the most valuable — and complex — legacies a charity receives. But in a slower and more unpredictable housing market, managing expectations around timescales, sale prices, and processes is essential.

This session explores what “realistic” looks like when dealing with property legacies — from managing internal and executor expectations, to deciding when to sell via estate agents or auctions, and how to approach properties that may be less marketable.

Through real-life examples and refreshing insights, Dan will look at how to balance efficiency with the responsibility to achieve best value for the charity.

1440-1455 **Break**

1455-1540 **Session to be confirmed**

1540-1555 **Break**

1555-1625 **How I Would Fix Legacy Administration**

Rebecca Billen, Blood Cancer UK
Kirsty Cockburn-Heeley, Macmillan Cancer Support
Rod Etherington, Marie Curie
Carolyn Jones, University of Liverpool

What would legacy administration look like if we could start again from scratch?

This thought-provoking panel session takes a sector-wide view of the biggest challenges — from probate delays and legal complexity to internal bottlenecks and communication breakdowns.

We'll explore bold, practical ideas to speed things up, add clarity, and remove the roadblocks, habits and processes that could be holding the sector back.

1625-1640 **End of Day & Closing Survey**

If you attended the conference, please click here to complete our closing survey - your feedback is greatly appreciated and used to inform our future conferences.
