

Working with Lay Executors

Communications, Compassion and Common Pitfalls – Paul Browne

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Lay Executors – A different Approach?

Who are we talking about?

Depends on the way notified

Usually close friends or family

Which type are you dealing with?

- Co-operative
- Austere
- Hidden Professional

How will you find this all out?

Lay executors were most likely to be male (71%) and affluent (74% ABC1)

There was a wide spread of ages, with 22% under 35, 38% aged 35-54, 36% aged 55-74 and just 4% over 75.

76% were beneficiaries of the estates they were administering & 76% knew they were named executors in advance.

Legacy Foresight Research Project 2022

Lay Executors

Initial Contact

Depends on the way notified



If executor contacts charity first match the communication



Which type?

Walk in

Email

Phone

Smee &
Ford



Weniger
aber besser

Less but
better

Music Center



Working with Lay Executors

Less but better

Music Center

Less but better

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Weniger aber besser

- Less but better
- Develop a distinct style of communications with lay execs
- Someone with history with the deceased or family – your stewardship records
- Fast responses are vital to initial calls, emails or letters – a slight can be felt if not

Communication Breakout

- What are your key points of trouble when deciding how to communicate with Lay Execs

Communication

- A separate set of letters or email templates at a minimum
- Develop a distinct style of communications with lay execs
- Someone with history with the deceased or family – your stewardship records
- Fast responses are vital to initial calls, emails or letters – a slight can be felt if not
- Research feedback was not great!

Timings

- Early and clear communications is vital – best method of approach?
- Careful consideration of timing of communications
 - Birthday
 - Anniversary of death
 - Avoid contact near family events such as Easter, Christmas, Eid-ul-Adha, Ramadan
 - Consider if comms are actually required at the time

Lay Executors

Right & Wrong....

- Example of getting it right - quote from one of the research interviews - "The [charity] contacted me [6 months after first contact]. 'We wondered if you were in a position to provide...' Not worded as a demand. A perfectly reasonable letter." (Male interviewee, 79, residual)
- Example of getting it wrong – quote from the survey – "The charity wrote to us just a few months after my aunt had died saying that as they'd not heard from us, they were reminding us of our responsibilities and that if we did not comply with her wishes we could be prosecuted." (survey respondent)

Bumps in the road

- Legal Issues
- Have they read the will correctly?
- Is there a claim on the estate?
- Have they been generous with the estate's money?

Lay Executors

What is needed?

- What is actually required for your records?
 - Will & Codicils
 - Grant
 - Property report in the event of an appropriation
 - Estate Accounts, including IHT calculation

A Future relationship?

- Is this possible?
- Is this appropriate?
- Case Study potential
- Gain a future donor

Resources

<https://www.legacyfutures.com/resources/spotlight-on-lay-executors/>

<https://legacymanagement.org.uk/legacy-insights/guidance-for-executors/>

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Paul Browne

Legacy Consultant

paul@legacy-link.co.uk

Legacy Futures
The Gridiron Building
Pancras Square
London
N1C 4AG

E: teams@legacyfutures.com
T: 02034880200

