Legacy Futures

Working with Lay Executors

Communications, Compassion and Common Pitfalls — Paul Browne



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





Wednesday, 16 April 2025

Walk in





Less but better

Music Center



Less but better

Working with Lay Executors

Legacy Futures

Music Center Less but better





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!

Legacy Futures

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

Legacy Futures

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

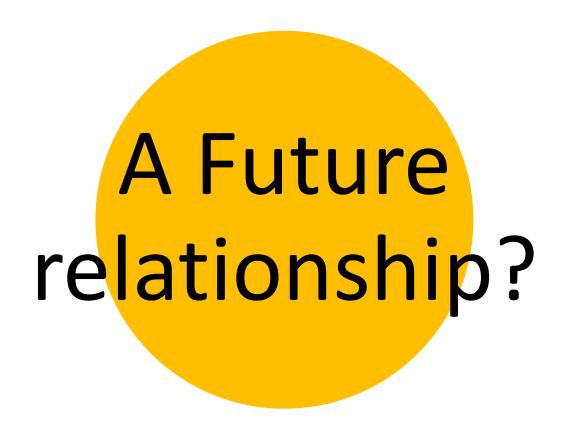
- Legal Issues
- Have they read the will correctly?
- Is there a claim on the estate?
- Have they been generous with the estate's money?

Legacy Futures

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





- 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/

Paul Browne

Legacy Consultant

paul@legacy-link.co.uk

Legacy FuturesThe Gridiron Building Pancras Square London N1C 4AG

E: teams@legacyfutures.com **T:** 02034880200



