



Charity Legacy Probate Collaboration of the Year

Legacy teams and probate practitioners have a tough job. Any number of challenges can present themselves in the process of distributing legacy income, from incorrectly named beneficiaries, difficult assets, un-cooperative family members. This award recognises law firms and probate teams who proactively work with charity legacy teams to maximise the value of legacy income and smooth the distribution of the estate without the need to resort to contentious probate.

Probate practitioners are encouraged to submit an entry detailing the way their collaboration with legacy teams delivers exceptional probate work and best practice which benefits practitioner, charity and ultimately sees the estate distributed as intended.

Criteria

The winner of this award was able to:

- demonstrate a culture of excellence, best practice and collaboration between the law firm and charity.
- evidence how they deliver an exceptional level of service to the client.
- reduce friction in the process of establishing beneficiaries and distributing the estate.
- identify how disputes are dealt with without the need for litigation.