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Legacy Academy Series

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Succession Planning and Legacy Giving

This session explores how integrating a charitable legacy in succession planning benefits families, offering financial and tax advantages while helping them create a meaningful, lasting legacy.

Clare Stirzaker
Partner, Boodle Hatfield LLP
Clare specialises in succession planning and related legal and tax matters for multi-generational families and their family offices. She also supports clients in developing their philanthropic strategy to enable greater and more effective wealth distribution.

Russell Prior OBE
The London Community Foundation
Russell leads the services providing family governance, family office advisory, family enterprise and wealth succession, philanthropy and social investment advice to clients across EMEA. This involves working with family businesses and families on the issues surrounding business ownership and wealth transition.

Key Facts:

- Legacy giving can support smooth succession – Early family engagement fosters understanding, prevents disputes, and strengthens governance.
- Reinforces values and identity – Integrating charitable goals links family wealth with core values and intergenerational philanthropy.
- Offers financial and tax benefits – Charitable vehicles like trusts or foundations enable tax-efficient wealth transfer.
- Encourages family engagement and education – Involving heirs promotes teamwork, leadership development, and philanthropy awareness.
- Creates lasting impact and fulfillment – Legacy planning ensures enduring charitable influence while providing families with purpose and satisfaction.

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