



**REMEMBER A CHARITY  
IN YOUR WILL**  
Help the work live on...

## Legacy Fundraising Top Tips

Charitable legacies are currently worth over £2billion a year to the sector. It is usually unrestricted income and has the potential to make a huge difference to your charity.

The charities that most successfully legacy fundraise are those where all staff and trustees are aware of the importance of legacies, and are comfortable bringing this into conversation when an opportunity arises.

It's important to communicate the "family first, charity second" message when talking about legacies, making people aware that they can support a charity after looking after loved ones. And by making legacy giving relevant for ordinary people and helping them understand the Will-writing process, you could significantly increase your charity's income.

**Solicitors and Will-writers** also have a vital role to play in increasing charitable giving.

They can ensure that clients understand all the options they have when writing their Will and invite them to consider a charitable gift.

By using the tips below all charities, regardless of size or budget, can implement a legacy marketing strategy and engage both internal and external audiences in the value of gifts in Wills.

### Internal audiences

Here are some suggestions for publicising the importance of legacies to your internal audience of trustees, senior managers, staff, stakeholders and volunteers – **your team of legacy champions**:

- Write an article for a staff newsletter announcing news or sharing inspiring supporter stories, to emphasise the importance of legacies to your charity
- Write a piece about the difference legacies make to your charity and how all teams can champion them
- Brief your trustees, board members and senior managers on why legacies matter to your cause
- Ensure that all trustees, staff and volunteers are aware of your legacy marketing and fundraising as well as any campaigns, so that you can capitalise on the activity
- Paint a picture of what legacies mean to your cause. For example, 'six out of ten lifeboat launches are paid for by gifts in Wills'
- Incorporate information about legacies into staff and volunteer inductions
- Publish a briefing sheet for staff and volunteers using the **key messages** in the section below
- Include information about legacies on your charity's Intranet
- Share latest legacy research findings with your team

- Set up face-to-face briefing meetings with groups and individuals
- Share content on social media

### **External audiences**

When talking to supporters about legacies, it's important to use the following key messaging in all communication channels:

- 7.3% per cent of the UK have left a gift to charity in their Will. A 4% increase would raise a further £1 billion for good causes every year
- Charities make a positive difference to the lives of millions of people
- We understand that family and loved ones will always take priority – remembering a charity in your Will doesn't mean excluding others
- A gift to charity in your Will does not have to mean large amounts of money. A small gift can make a very real difference
- Gifts in Wills generate more than £2 billion a year for good causes
- 74% of us regularly give to charity in our lifetimes and when asked, 35% of people are happy to give a small percentage of their Will as a gift to a charity, after they have looked after family and friends. There is huge potential to increase income from legacies

Legacy fundraising is not a form of direct response fundraising, so **repetition** of your key messages is **vital**. Ensure legacy content appears at least twice a year in the channels suggested below. The "drip drip effect"...

### **Some suggestions for ways to reach out to your supporters and talk about legacies include:**

- Write a piece about legacy fundraising for your supporter / volunteer newsletter
- Write a blog or news piece for your website
- Get noisy about legacies! Set up a dedicated area on your website (ideally linked to on the homepage) talking about the importance of legacies to your charity, signposting people to your legacy contact
- Write news articles, blogs or features on the 'how to support us' area of your website
- Post and share the above on social media, as well as signposting people to the information about gifts in Wills on your website

### **Remember A Charity**

Remember A Charity was formed in 2000 and now has over 140 member charities, who work together to encourage more people to consider leaving a gift to charities in their Will. Gifts in Wills form the foundation of charities in the UK. Many charities depend on legacies, without them, they would not exist. Remember A Charity is the Institute of Fundraising's long-term campaign to increase legacy giving to charities.

[www.rememberacharity.org.uk](http://www.rememberacharity.org.uk)