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Smee & Ford
Wilmington plc

LEGACY TRENDS 2018

DISCOVERING
POTENTIAL THROUGH
DATA

Wilmington
Charities



Legacy Trends 2018 Update: Discovering potential through data

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1. Introduction and key findings

Smee & Ford has more than 125 years' experience in legacies. Our team reads through around 5,000 Wills each week, identifying and reporting any charitable content. This has enabled us to build an extensive database of legacy giving in the UK, and from September 2012 we have recorded every bequest for each named charity mentioned in a Will. Since then, we have identified more than 26,000 charities that have been named in Wills, with 3,000 named for the first time in 2017.

Smee & Ford has the most comprehensive information on legacy giving. Our data can be used to determine trends in the legacy market which, in turn, can help charities to forecast their potential future legacy income or to help plan their legacy marketing strategy. Looking at the complete legacy picture for 2017, we can identify several key traits in donor profiles and trends in UK legacy giving.

This report presents some of our latest findings to the sector and will cover:

- Why are legacies important?
- What is the potential?
- What is happening to legacies in the overall market?
- Who are your legators?
- What might your legacies be worth?
- What can you do next to optimise your legacy potential?

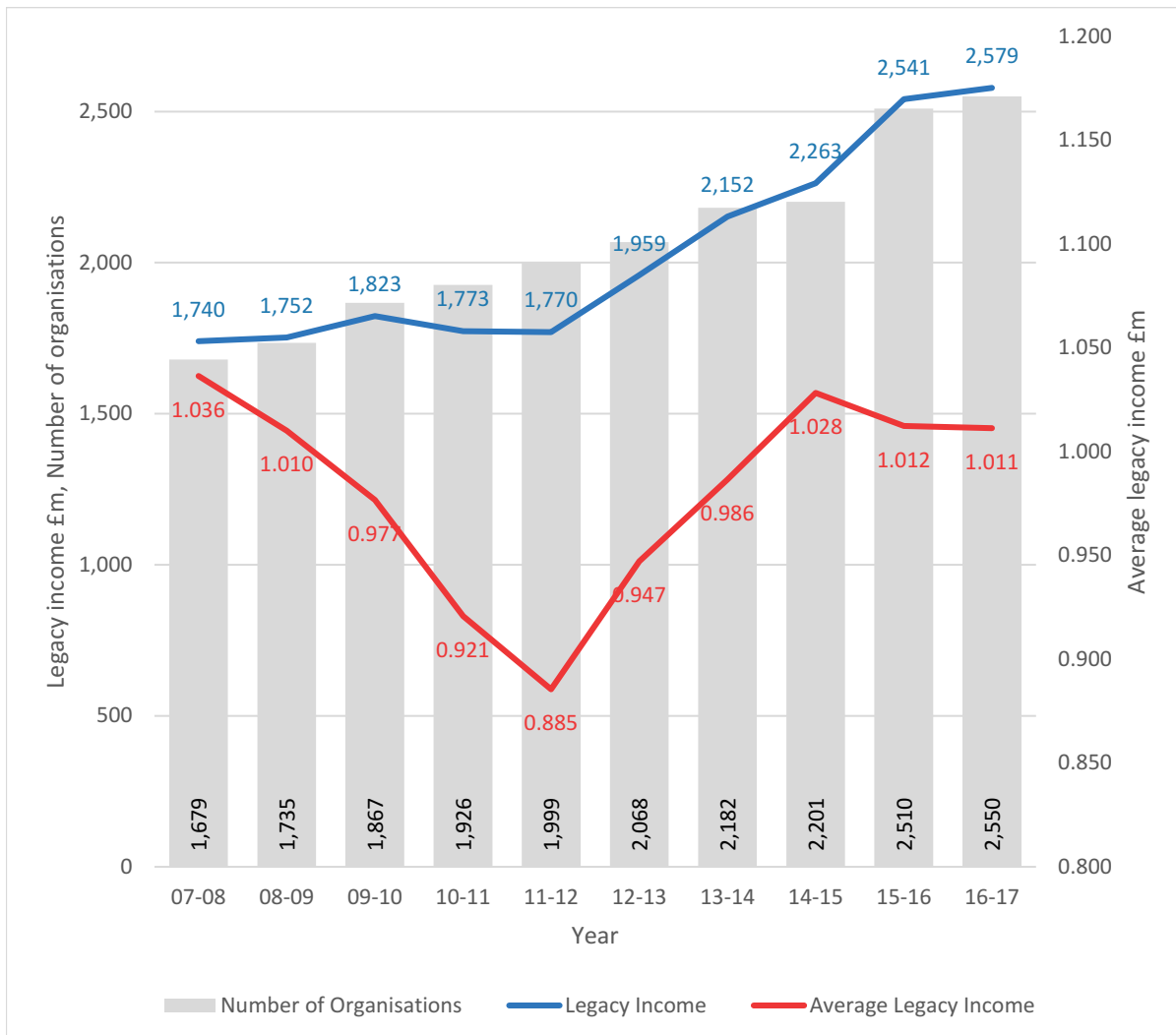
Key findings

- Legacy income is between £2.8 billion and £2.9 billion – the largest ever reported
- There were 36,445 charitable estates in 2017 which is consistent with the number recorded in 2016. The general longer-term trend is that the number of charitable estates is increasing
- Charitable estates were worth £17.9 billion in 2017 growing by over £1.8 billion over the year period pushing up residual donations
- 15.6% of the value of charitable estates (donor wealth) went to charities
- 6.1% of the population leave a bequest in a Will
- 122,144 bequests were contained in Wills in 2017
- The typical profile of a legator is:
 - Female
 - Aged 77 when she writes her Will
 - Dies when she is 85
 - Lives in the South of England
 - Leaves three charitable bequests in her Will
- 34.7% of charitable Wills contain just one charitable bequest and the most popular cause for sole bequests is places of worship

2. Why are legacies so important to charities?

In 2013, reported legacy income for charities with over £500,000 of total income exceeded £2 billion. We can now report that organisations that have their financial year ends between July 2016 and June 2017 have legacy income of £2.6 billion, (see Figure 1) but as more charities release their financial accounts we would expect this to rise further. Legacy income grew by £37.8 million over the previous year.

Figure 1: Aggregate legacy income, average legacy income and the number of organisations receiving legacies over time (£m)



Source: Charity Financials

Legacy income has grown significantly, especially since 2011/12 from £1.8 billion in 2011/12 to £2.6 billion in 2016/17. The number of charities reporting legacy income has also increased: from 1,679 organisations in 2007/08 to 2,579 organisations in 2016/17 (please note that part of this rise is due to the increased number of charities reporting legacy income as the number of charities with income greater than £500,000 generally increases year on year). Just over one in five charities receive legacy income (where the total income exceeds £500,000).

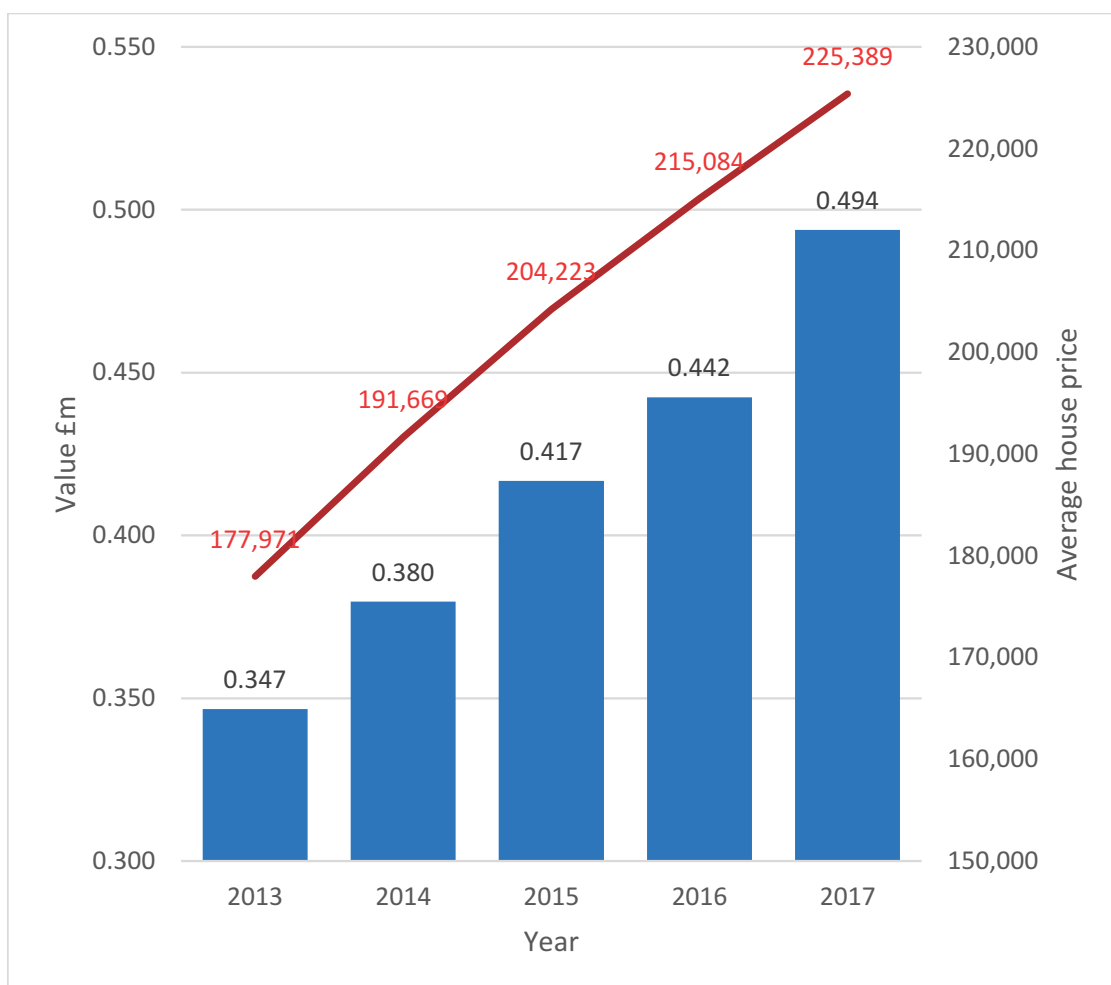
Legacy income drivers

Legacy values are the product of wider economic forces, namely house prices and investment valuations. This is because of the way in which legacies are made in Wills, as they can be either pecuniary, a set figure, or residuary, whereby a percentage of the residual estate is bequeathed.

Usually when we die our greatest asset is our home, hence the importance of house prices. It is these residuary legacies which greatly affect total legacy income and is why the sector witnessed little or no growth in legacy income between 2007 and 2011, during the recent economic recession when the housing market plummeted. This is reflected in Figure 1, which shows legacy income witnessed slow growth and the average value of legacy income decreased over the period.

Pecuniary bequests accounted for around 10% of total legacy income in 2017 and 90% came from residuals, which emphasises the importance of these types of bequests. It also means that legacy income is susceptible to wider economic or political forces which could be affected by either the housing or investment markets – see Figure 2 for correlation between the average charitable estates and average house price.

Figure 2: Average charitable estate values compared to average UK house prices



Source: Smee & Ford 2018 Legacy Trends

3. Which organisations generate the most legacy income?

Table 1 shows the top 25 charitable organisations by total legacy income and how their legacy income has changed over the past five years. Cancer Research UK has consistently received the most ever since it was formed from the merger of The Cancer Research Campaign and The Imperial Cancer Research Fund back in 2002. Before that date, the RNLI had historically received the most. Annual legacy income for these 25 organisations exceeds £1 billion.

Table 1: Legacy income of top 25 charitable organisations over five years

OrgName	YearEnd	Legacy income (latest year £m)	Legacy income (previous year £m)	Legacy income (Year 3)	Legacy income (Year 4)	Legacy income (Year 5)	Aggregate 5 year income
Cancer Research UK	31/03/17	186.600	177.800	166.800	163.100	142.500	836.800
Royal National Lifeboat Institution	31/12/16	130.5	118.5	114.3	118.4	101.4	583.1
Royal Society for the Prevention of Cruelty to Animals	31/12/16	78.613	63.138	67.207	61.966	67.671	338.595
Macmillan Cancer Support	31/12/16	76.754	63.85	61.984	59.188	51.219	312.995
British Heart Foundation	31/03/17	73.300	67.000	60.800	55.500	53.955	310.555
National Trust, The	28/02/17	61.693	51.556	50.538	45.914	50.229	259.93
Salvation Army Trust	31/03/17	50.483	51.974	43.865	47.870	38.737	232.929
Guide Dogs for the Blind Association, The	31/12/16	47.9	44.3	34.3	33.7	34.5	194.7
PDSA	31/12/16	45.135	39.514	42.829	40.612	38.940	207.030
Royal National Institute of Blind People	31/03/17	41.73	37.396	33.977	40.797	40.711	194.611
Dogs Trust	31/12/17	34.919	30.395	26.716	24.996	20.090	137.116
Royal Society for the Protection of Birds	31/03/17	34.699	34.062	30.579	30.399	28.367	158.106
Marie Curie Cancer Care	31/03/17	33.212	28.735	26.750	26.415	22.664	137.776
British Red Cross Society, The	31/12/16	30.9	32.6	22.2	21.8	20.3	127.8
Age UK	31/03/17	27.578	25.643	24.732	22.055	20.089	120.097
Cats Protection	31/12/16	26.129	30.529	24.202	25.349	20.426	126.635
National Society for the Prevention of Cruelty to Children	31/03/17	25.079	23.350	21.372	20.909	19.955	110.665
Donkey Sanctuary, The	31/12/16	24.841	22.505	20.769	19.957	17.971	106.043
Charities Aid Foundation	30/04/17	23.875	35.463	0.000	0.000	0.000	59.338
Woodland Trust, The	31/12/16	21.949	14.209	13.124	9.02	7.341	65.643
Royal British Legion, The	30/09/16	20.308	18.026	16.038	12.596	12.322	79.290
Oxfam GB	31/03/17	19.8	17.3	13.8	14.1	11.8	76.8
Save the Children	31/12/16	18.796	18.732	16.179	18.280	13.088	85.075
Blue Cross (Incorporating Our Dumb Friends League), The	31/12/16	18.458	17.356	17.503	14.329	15.673	83.319
Great Ormond Street Hospital Children's Charity	31/03/16	17.828	22.059	11.460	12.036	11.465	74.848
Total		1,171.079	1,085.992	962.024	939.288	861.413	5,019.796

Source: Charity Financials

Organisations with the greatest increases in legacy income

The table below shows the organisations that have experienced the greatest yearly increases in legacy income. The top 25 amounted to an increase of an additional £143 million in legacy income.

Table 2: Organisations with the largest annual increases in legacy income

Charity	Year End	Legacy income (latest year £m)	Legacy income (previous year £m)	Yearly change in legacy income £m	Percentage change
Macmillan Cancer Support	42,735	76.75	63.85	12.90	20.21
Royal National Lifeboat Institution	42,735	130.5	118.5	12.00	10.13
National Trust, The	42,794	61.69	51.56	10.14	19.66
Cancer Research UK	42,825	186.6	177.8	8.80	4.95
Woodland Trust, The	42,735	21.95	14.21	7.74	54.47
Ymddiriedolaeth Clough Williams-Ellis Fndn	42,465	7.45	-	7.45	-
British Heart Foundation	42825	73.3	67	6.30	9.4
PDSA	42735	45.14	39.51	5.62	14.23
UNICEF-UK	42,735	9.26	4.04	5.23	129.43
Marie Curie Cancer Care	42,825	33.21	28.74	4.48	15.58
Royal National Institute of Blind People	42,825	41.73	37.4	4.33	11.59
Royal Air Forces Association, The	42,735	6.41	2.2	4.21	191.85
Aid to the Church in Need (UK)	42,735	6.45	2.53	3.92	155.24
Yorkshire Cancer Research	42,825	6.66	2.74	3.92	142.8
Dogs Trust	42,735	30.4	26.72	3.68	13.77
Guide Dogs for the Blind Association, The	42,735	47.9	44.3	3.60	8.13
Jewish Care	42825	7.05	3.49	3.57	102.32
World Society for the Protection of Animals	42,735	7.83	4.59	3.24	70.74
International Planned Parenthood Federation	42,735	3.24	0.31	2.93	939.74
Campaign to Protect Rural England	42,735	4.16	1.3	2.86	220.25
Battersea Dogs & Cats Home	42735	14.92	12.09	2.84	23.49
Sightsavers International	42,735	12.73	9.95	2.77	27.87
Wood Green Animal Shelters	42,825	7.07	4.31	2.76	64.03
Brooke Hospital for Animals	42,825	10.12	7.44	2.68	36.05

Source: Charity Financials

4. What is the potential value for legacies in the future?

If we consider that charitable estates were worth £17.9 billion in 2017, and legacy income was worth £2.8 billion, we can calculate that 15.6% of the net worth went to charities. Applying this percentage to the total estate values for non-charitable estates (i.e. those that do not contain a gift to charity), legacies could potentially be worth another £9.7 billion to the sector.

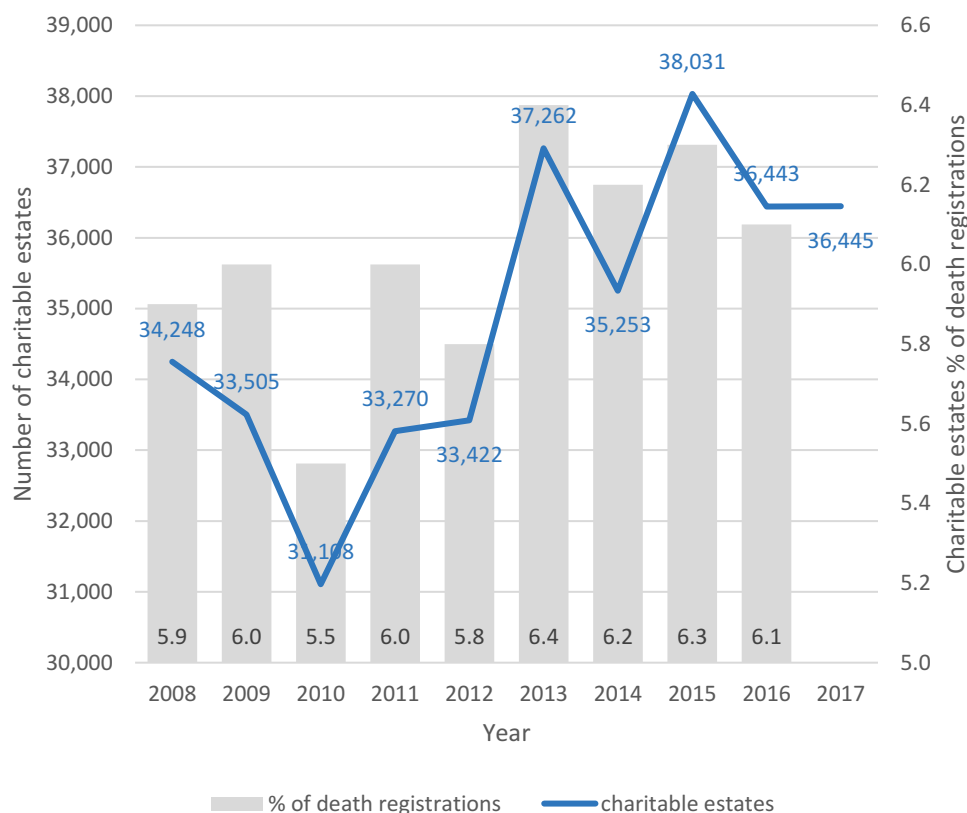
If we can convert just one percent of non-charitable estates to charitable, we can raise another £97 million each year for charities.

Using the total number of probated estates in 2017, if just 2,304 (one per cent) of those people included a gift to charity in their Will, it would have raised an additional £97 million for charities.

The number of charitable estates recorded by Smee & Ford fluctuates annually and is generally somewhere between 30,000 and 38,000. In recent years we have seen that the annual number of death registrations has fallen due to people living longer, yet the annual number of charitable estates has remained fairly consistent.

Figure 3 shows that in 2015 Smee & Ford recorded the most charitable estates over the past 10 years, with 38,031 estates identified. However, in 2016 this dropped to 36,443 and in 2017 it remained remarkably constant with 36,445 estates. In general, the number of charitable estates is increasing.

Figure 3: Historic trends in number of charitable estates



Source: Smee & Ford 2018 Legacy Trends

Although there are no guarantees, we have seen a decrease in death rates over the past 10 years but this isn't necessarily a bad thing for legacies: as detailed above, the number of charitable estates is steadily on the increase. That is because generally a higher percentage of Wills now contain a gift to charity – from just 4.6% of all estates in 1997 to 6.3% in 2016 (using death statistics supplied by the ONS*, 2017 statistics are due in July 2018). With legacy conversations becoming more acceptable, we should see this percentage continue to rise.

If we were to apply a linear trend-line to Figure 3 this would show a positive correlation between the number of charitable estates and time (in years). It will be interesting to see when the number of charitable estates exceed 40,000.

5. Who are the people leaving legacies to your charity?

'Dorothy Donor' is the term used by the sector to describe the typical charity donor. Using the 2016 data from Smee & Ford, we have identified the 'average' person leaving a charitable legacy as:

- Female
- 77 years of age when she writes her last Will (but 81 is the most common age)
- On average dies at 85 (although the most common age is 88)
- The lapse between the date of Will and date of death is 6.8 years
- Lives in the South of England
- Leaves 3.4 bequests to charity

So now charities can go off and target this lady, can't they? Unfortunately things are rarely that black and white. Legators to different causes, and indeed more so to different charities, vary considerably. Dorothy Donor might be the typical supporter for one cause, but 'Dennis Donor' is likely to be the average supporter for another.

'Legators are likely to be female'

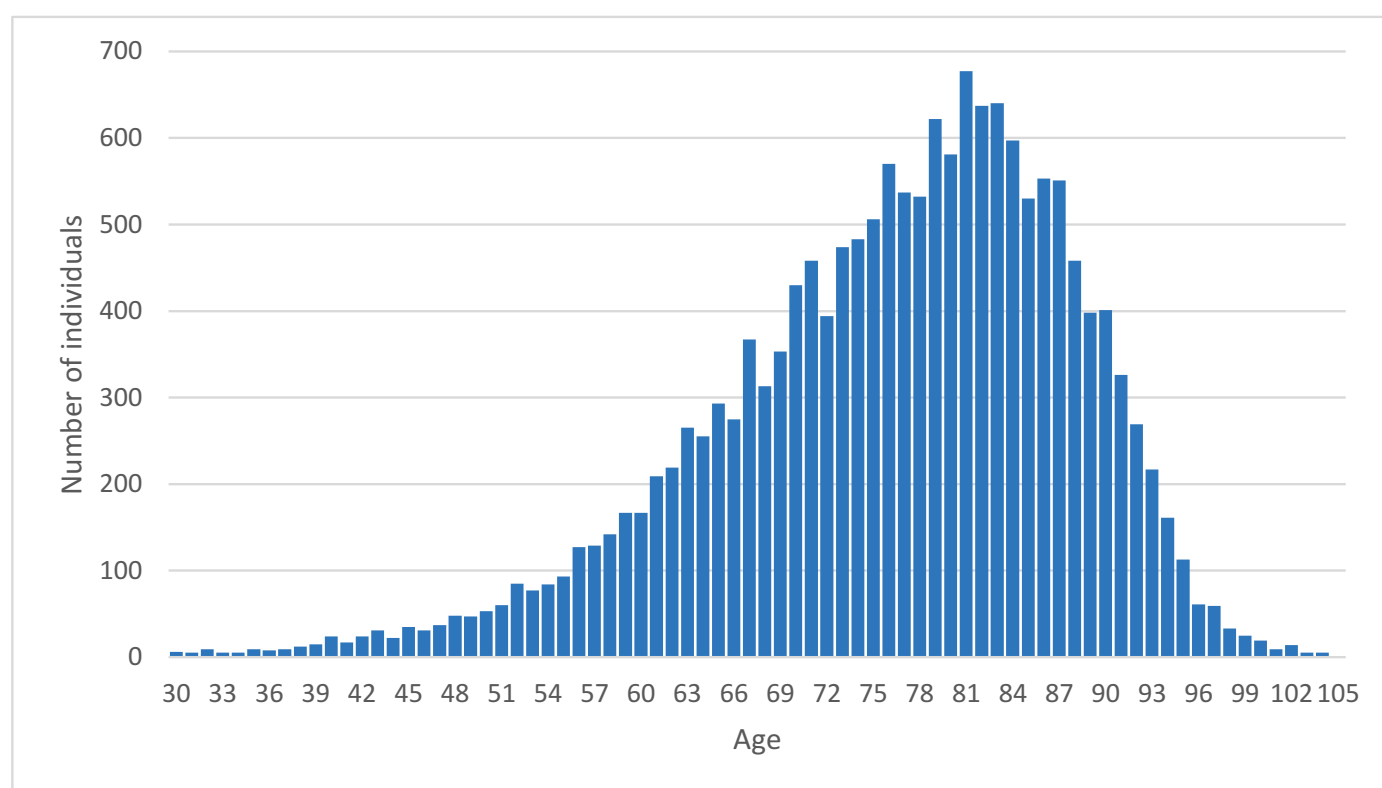
About 60% of legators are female, but that means four in every 10 are male. As with all of Dorothy Donor's traits, the predominant gender is largely dependent on the cause or the charity in question. For example, legators for aged charities are typically female, but for education charities they are generally male.

'The typical donor is 77 when she writes her Will'

Although the average age for female legators writing their Wills is 77 (for males it is 74), looking at individual causes and charities provides a broader range than this. As expected, people write their Wills at certain times of their lives – e.g. when they get married, have children, become terminally ill, get divorced or lose a loved one.

'People are rewriting their Wills'

As shown in Figure 4, legators are typically older when they write their Wills. Cross-referencing this with the death rates for the different age bands, it is not surprising that younger people are not leaving the same number of legacies as older people as fewer of them are dying. However, it is interesting to note that people are obviously re-writing their Wills when they reach a certain age: the count starts increasing at around 60 years old. When you consider that for people who reach the age of 65, life expectancy of women is 85.9 and men is 83.4 (source: ONS life expectancy), this trend may seem obvious, but conversely charities should not rule out their younger audience.

Figure 4: Age at leaving Will for charitable estates 2017

Source: Smee & Ford 2018 Legacy Trends

Research suggests that people write several versions of their Will but are likely to keep a lot of the content throughout the various permutations. This means that if you can target people writing their first Will and manage to secure a legacy in that Will, even if they re-write their Will when their circumstances change, it is likely to still contain that important legacy to your charity.

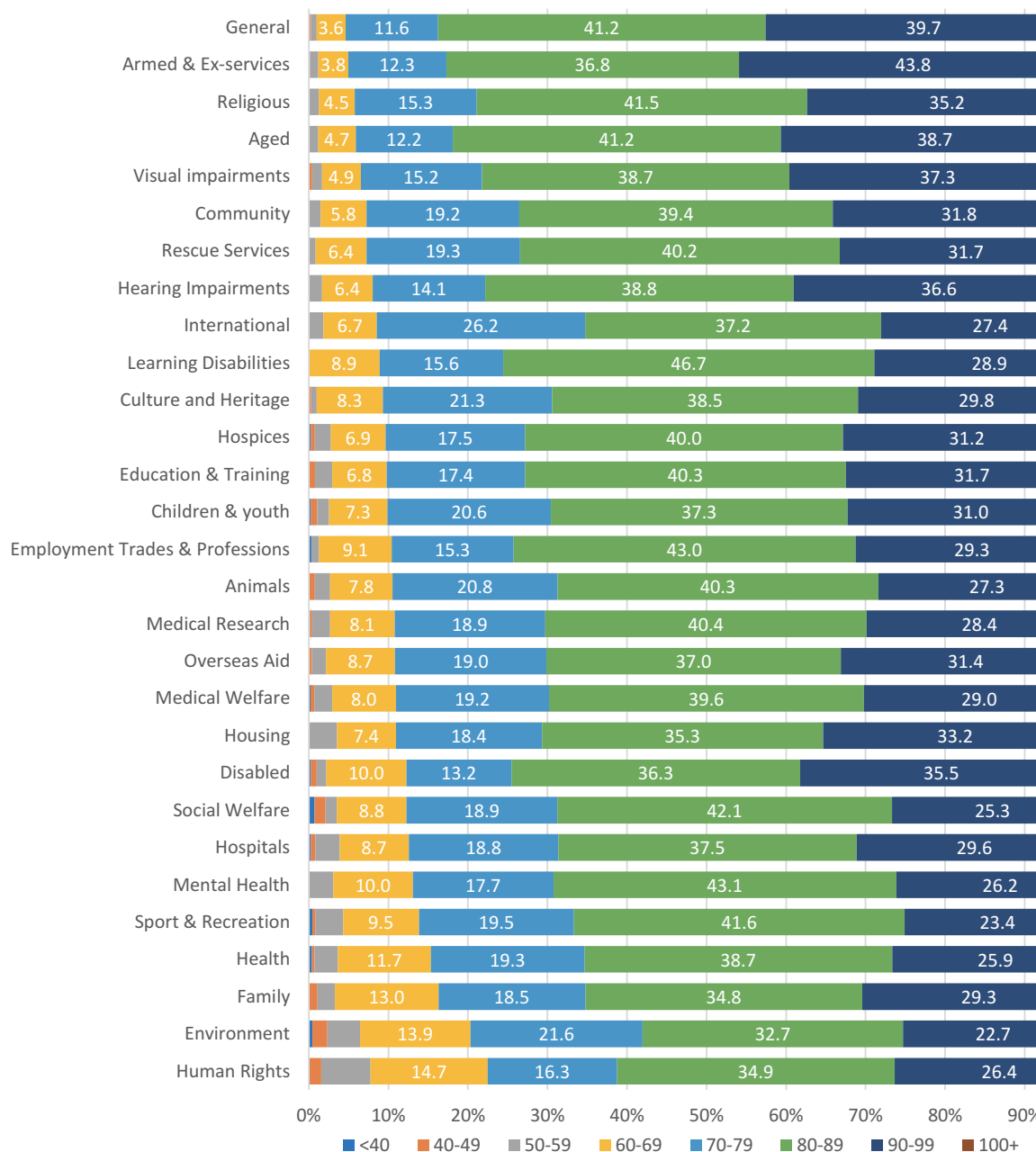
6. What causes are popular with different age groups?

If you are going to segment your donor database, then one of the most interesting things to look at is what causes are popular with which age groups (see Figure 5). For charities working across a number of areas, this can be a great way to determine your legacy messaging.

For example, if your donor database is primarily under-30s, then you might wish to focus on the research aspects of your charity’s work. You can drill further into this data by looking at the second or third most popular causes supported in each age band, and try to tailor your advertising further.

Figure 5 shows the age bands of supporters for each cause. It clearly shows that Human Rights, the Environment and Family charities have a greater proportion of their supporter base coming from younger age groups in relation to other causes.

Figure 5: Causes supported by the different age bands



Source: Smeed & Ford 2018 Legacy Trends

'There is an average 6.5 years between date of last Will and date of death'

This figure can help you identify when future legacy income might come in for your charity based on your marketing activities now, but it is important to know the lapse for your charity or cause, rather than using the average for the sector.

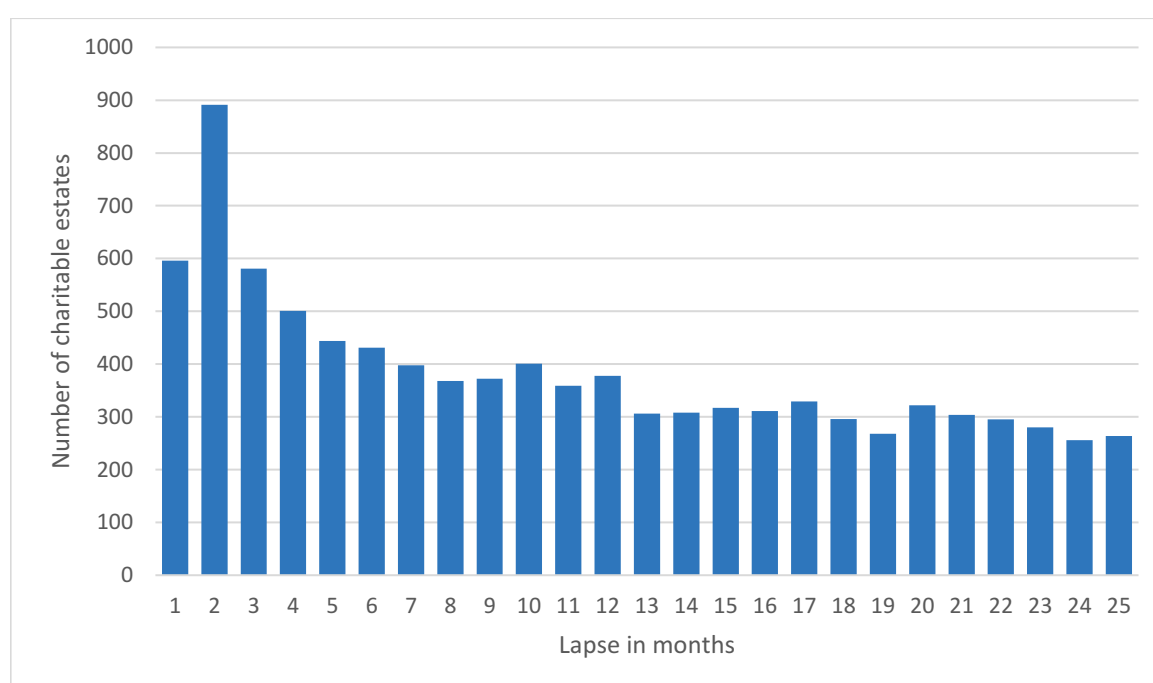
If you keep a record of all your past legacies, you can use your own data to find out your average lapse time. Assuming you have a significant number of legators over the period, you can then use this to determine when legacies might come in. If you haven't had many legacies in the past, you can get a good idea of what your organisation can expect by looking at charities with similar objectives to you, or to the overarching causal area trends.

If we look at armed and ex-services causes for example, the average lapse between date of Will and date of death is 5.5 years, so any Will that is written today naming your organisation won't get to you for another 5-6 years. It is important to remember this when putting forward any legacy funding proposals to your board or trustees: it is likely they won't see any return on their investment for at least this number of years. It is also important to note these lapse values are for the date of the last Will; potentially a charity could have been included in a previous Will, thus extending the timeframe even further.

Working out average lapse times (in years, as above) can be helpful for rough forecasting, but as each Will varies so much, we can get an even more accurate picture if we approach it in a slightly different way. Looking again at the sector, by plotting the lapse in months against the count of estates (see Figure 6), the most common time for people to write or amend a charitable Will is just two months before they die. In fact, around 50% of people die within five years of writing or changing the content of their Will, and almost 16% within one year so it can vary across the sector.

Looking at the same data for an individual cause will provide more specific trends and can be used as a better indicator of lapse times for your charity.

Figure 6: Lapse from date of Will to date of death (expressed in months)



Source: Smeed & Ford 2018 Legacy Trends

7. Where do legators live and how many legacies do they leave?

‘Most legators come from the South of England’

This may seem like an obvious one because the general population is greater in the South, so we can reasonably expect the death rates to be higher, and therefore the number of charitable estates should be higher too. However, looking at the number of charitable estates by region we can see that London, which has a population of 8.8 million which represents 13.4% of the UK population, only created 7% of charitable estates in 2017. The South East generated the most and the Northern regions generated the least.

Table 3: The number and % of charitable estates by region

Region	Number	%
Central	2,546	7.14
East	4,055	11.37
London	2,486	6.97
North	1,406	3.94
North East	3,439	9.64
North West	3,351	9.4
Scotland - East & Highlands	739	2.07
Scotland - West	525	1.47
South	4,042	11.33
South East	4,686	13.14
South West	4,042	11.33
Wales	1,547	4.34
West	2,803	7.86

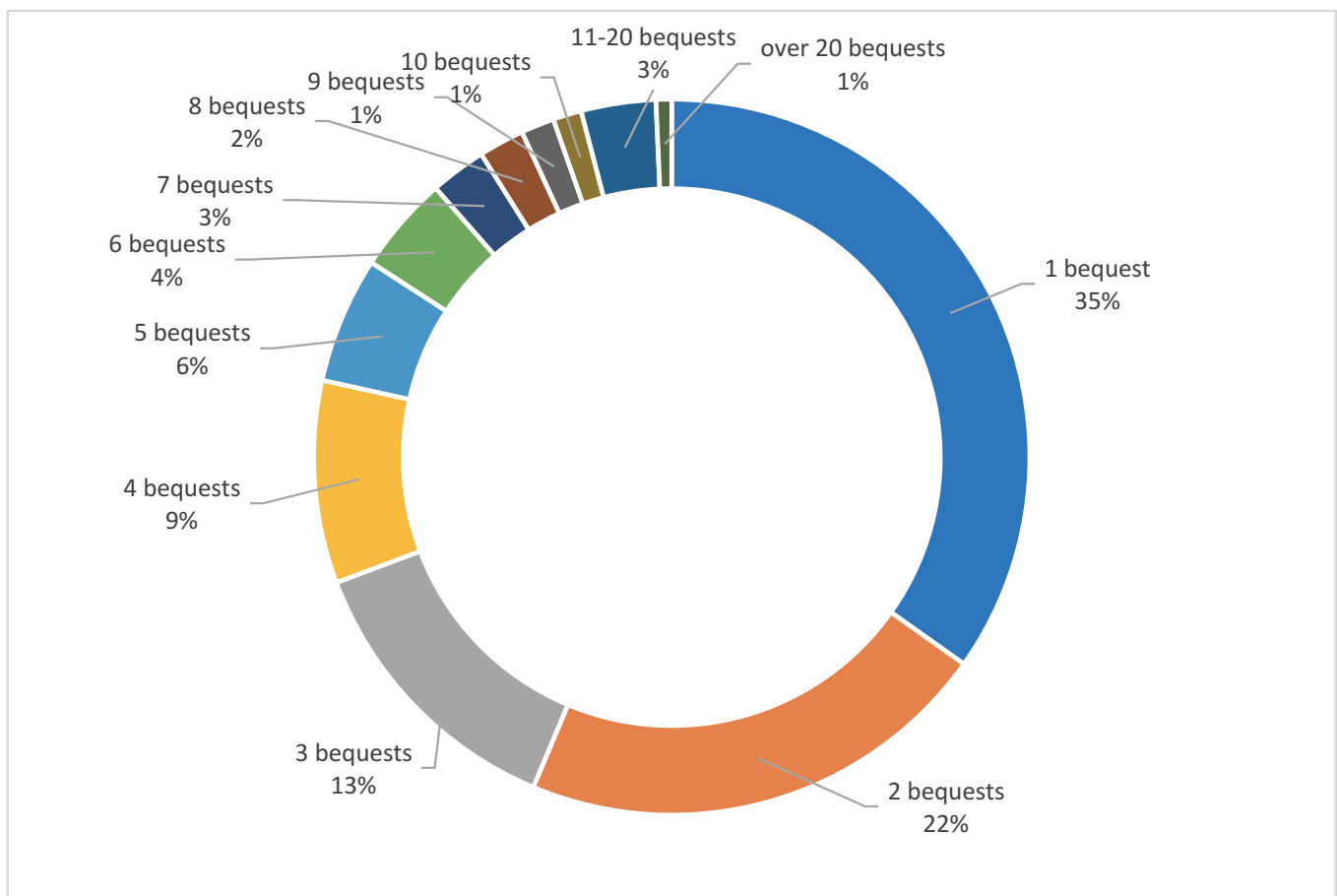
Source: Smee & Ford 2018 Legacy Trends

For local charities, any knowledge gained from geographical analysis is likely to be of limited use – it is most likely to confirm that many of their legators are from the local area. But doing this analysis for national charities or causal area could uncover some important trends to help you gauge the success of your organisation’s previous legacy marketing campaigns, which may influence future activities.

‘Charitable Wills contain 3.4 bequests’

The average number of bequests per charitable will was 3.4 in 2017, although the actual numbers vary from one to a staggering 216 for one individual.

Averages can be useful when providing rough figures, but they don’t necessarily paint the whole picture. For example, the most common number of bequests left in any given will is just one, which accounts for 35% of all charitable wills in 2017 – see Figure 7. There were 25,155 (69.3%) legators that contained up to three bequests in their will. Conversely, 256 individuals made more than 20 bequests.

Figure 7: Number of bequests left in an individual's Will

Source: Smee & Ford 2018 Legacy Trends

Analysis from Smee & Ford's Legacy Spotlight reports can help you identify how many other charities are named in Wills that contain a gift to your charity. If you are usually mentioned in Wills that contain a large number of charitable beneficiaries, it is likely you will receive smaller legacies than charities named as sole beneficiaries.

It may also be worth exploring your co-beneficiaries – is your charity usually named alongside other specific charities? Could you use this to your advantage? For example, if your charity is often a co-beneficiary ('bedfellow') with a children's charity, perhaps there was a particular legacy marketing campaign your charity did which focused more on children?

8. What can you do next to optimise your legacy marketing impact?

1. Get internal buy-in

Before you can roll out any legacy marketing campaign, you'll need to get internal buy-in. Start by getting support at board level: explain to them the importance of gifts in Wills to your organisation. Be sure to include some facts and figures about legacies (Smee & Ford's Legacy Spotlight can provide statistics in support of legacy marketing, from charities similar to yours). This will help get your chief executive, trustees and other senior staff on board.

Once you've got senior level buy-in, you can then start to build a 'legacy culture' throughout your organisation. Appointing a 'legacy champion' among your trustees will help encourage everyone to get on board with legacy messages. Everyone in your organisation should understand how important gifts in Wills are in enabling you to carry out your work, and that they all have a part to play in helping promote this method of giving.

Ensure your legacy team is visible and accessible, so those without specialist knowledge are clear on who to signpost interest to.

2. Determine your 'typical' legator

Whether it's a simple spreadsheet or an intricate database, you should have some kind of CRM system in place to help you manage and maximise all your fundraising relationships – including legacy prospects.

Starting with your own legacy data, work out the typical profile of people who have left your charity a gift in their Will over the last 12 months using some of the criteria outlined in this paper. Are they primarily male or female, or is it an even split? How old are individuals when they leave a gift to your charity? Where do they live? How long is it between them writing their Will and you receiving the legacy?

Next, look at your financial data. What are your average values across the different types of legacies? What is the average over two/five/10 years? This information will help you with legacy forecasting, as well as legator profiling.

If you don't have the time or resource to run your own analysis, Smee & Ford's Legacy Spotlight can help you identify the profile of a typical legator.

3. Identify your legacy prospects

Once you have defined your 'typical' legator, use this data to segment your donor database to identify those supporters who fit the profile.

If someone isn't currently a regular giver, it doesn't mean they don't care about your cause - so don't discount someone just because they haven't given to your charity in the last six months. It may be that they have stopped giving because of their immediate financial circumstances and might respond well if offered a different proposition, one that does not involve such an immediate financial commitment – such as leaving a gift to your charity in their Will.

4. Get clued up

Make sure your legacy marketers are armed with the knowledge to answer any questions your prospects might have. Donors will want to know how their money will be spent, and what the practicalities surrounding leaving a legacy are (e.g. how they can make or amend their Will, what types of gift they can bestow and what tax breaks are available).

Being able to confidently answer all of your supporters' questions will help reassure them that leaving a gift to your charity is the right decision.

5. Keep your data clean

Ensure you have systems in place that will capture and record the correct information from your legacy notifications.

It is important to record your supporter's details correctly, and update your data regularly. Out-of-date or inaccurate data generates waste, expense and sometimes even upset (for example, if you misspell a supporter's name, get their address wrong, or send them communications when they have asked to no longer receive them).

It often takes many years for people to get around to making or changing a Will, so it's important to keep track of the legacy marketing status of your supporters. Are they an 'enquirer' (having requested information on how to leave a legacy), an 'intender' (having stated an intention to include your charity in their Will) or a 'pledger' (having already included your charity in their Will).

6. Be systematic

Draw up separate plans to reach your 'colder' (e.g. lapsed donors) and your 'warmer' (e.g. highly engaged, regular givers) audiences.

Determine the journey that your potential legacy pledger will be taken on, and 'steward' them through it. If a supporter shows an initial interest in leaving a legacy, decide what and when the next communication with them will be (e.g. sending them further information in the form of a legacy pack).

Being systematic in your communications will help increase the long-term value of your supporter base.

7. Make a legacies webpage

Your website plays a key role in marketing your cause and connecting with donors. If you haven't already done so, set up a dedicated gifts in Wills page on your charity's website. It can be a simple page with information about the difference gifts in Wills make to your organisation, and how supporters can find out more about leaving a gift.

You should also make use of other free online resources that will allow you to promote your legacies, such as Charity Choice (www.charitychoice.co.uk). The site has an area dedicated to legacies, which includes a search tool that helps potential pledgers to connect with causes, easy to download legacy and pledge forms which you can direct donors to, and the ability to create your own specific legacy appeal page.

8. Have conversations

Don't be afraid to go out and have conversations with your supporters about gifts in Wills. You may be surprised by how open people are to talking about legacies. Some of your supporters may have never considered leaving a gift in their Will before – or even writing a Will. Talking about it will provide food for thought to discuss with family and partners.

Conversations about legacies don't have to be a sombre affair – legacies make sure the things you value continue long into the future.

By talking more openly about gifts in Wills, you will also help supporters to see that leaving a legacy is not just the preserve of the very wealthy; it is something we can all do.

9. Use the right language

When talking about legacies, it's important to remember that language, tone and content all have a huge impact on supporters. Leaving a legacy can be quite a complex process, so make it easier for your supporters by keeping your communications as clear, concise and jargon-free as possible.

When it comes to the legacy ask, a soft approach is usually best. If speaking directly to a supporter, allow the conversation to be led by them. Listen to their thoughts and feelings about legacy giving, discuss their concerns, and try to resolve them. In most cases, it is best not to go in with a direct legacy ask straight away. So in the first instance, ask them if they might consider it, or if they might like to receive further information.

No matter the level of enquiry, always remember to say thank you – this will lay the foundations of goodwill for the future.

10. Tell stories

Telling a story is the most effective way to get your legacy message across. An inspirational story will help your supporters to see the difference their gift will make, so be sure to include stories in all your marketing materials and press releases.

A great story will tap into your supporter's emotions, and make them care. Remember, people give to people: you will likely make a much stronger emotional connection if you keep your story focused on one individual beneficiary.

Keep your story simple, and place the donor at the heart of it. Show them how a gift in their Will can help.

11. Take a multichannel approach

Think about how you might be able to integrate the various communication channels – direct mail, face-to-face, email and telephone calls, PR, display advertising and social media – so that they complement one another.

As part of this, you might consider holding special, tailored legacy events, to which you can invite your top legacy prospects. Face-to-face events are a great way to develop personal relationships with legacy prospects, and fantastic opportunities to talk about your work and how gifts in Wills can help.

Spread legacy messaging across various mediums to increase the chances of supporters remembering you when writing their will.

12. Cross-sell the legacy message

To really embed the legacy message, make sure it runs across all your fundraising activity. Set up a cross-sell plan with your individual giving teams, and mention gifts in Wills alongside other fundraising messages in as many communications and marketing materials as you can.

A brief, simple message letting your supporters know how important gifts in Wills are to your beneficiaries will help the legacy message stick.

13. Don't stop talking

So, you've stewarded a supporter through the legacy journey from their initial enquiry right through to them pledging a gift in their Will – but the conversation shouldn't end there. You must look after your pledgers; they've taken a big step and need to be continually reassured that it was the right decision.

This reassurance could come in the form of an occasional, simple communication saying how much you appreciate them remembering your charity in their Will, and reminding them of the incredible difference they will make to your cause in years to come. Just remember to respect how they have asked to be communicated with, and how often.

14. Take the long view

Remember, a legacy marketing campaign is not about annual fundraising targets; it is likely to be several years before your legacy campaign yields hard cash for your charity. Legacy marketing is about identifying quality leads, and gently stewarding those who have shown an interest in leaving a legacy through to pledging a gift.

A good way of measuring your success along the way is not just to record the number of pledges in the pipeline, but also the number of new leads/opportunities that arise following a legacy campaign or event. You can even measure success to some extent in how many hits your legacies webpage receives before and after a marketing campaign.

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About Wilmington Charities data

Smee & Ford

The Smee & Ford database records every mention of a charity in Wills. It records details of the person making the bequest, such as gender, estate value, location, age and date of birth (where applicable), the type of bequest, the value and the named recipient of the bequest. Since 2012, Smee & Ford has processed 1.4 million Wills and has identified more than 180,000 charitable estates, making over 600,000 bequests.

Charity Financials

Charity Financials is a database of the largest 5,000 charities in the UK, recording the most granular financial details that can be extracted from published annual financial statements. It includes a breakdown of income, expenditure and balance sheet assets and liabilities. It also records staff costs, audit fees, salary ranges and includes key financial ratios, all of which can be utilised to make financial comparisons.

To register your interest, complete the form below and our team will be in touch with further details.

Please fill in your details here and pass this form to one of the team

Name.....

Company name.....

Job title

Email address.....

Phone number

Area of interest.....

Alternatively, please contact our Group Sales Director for more information:

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