



JUNE 2019

Smee & Ford
Wilmington plc

LEGACY TRENDS 2019

Wilmington
Charities



Legacy Trends 2019 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 28,357 charities that have been named in Wills, with 2,828 named for the first time in 2018.

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 2018, 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

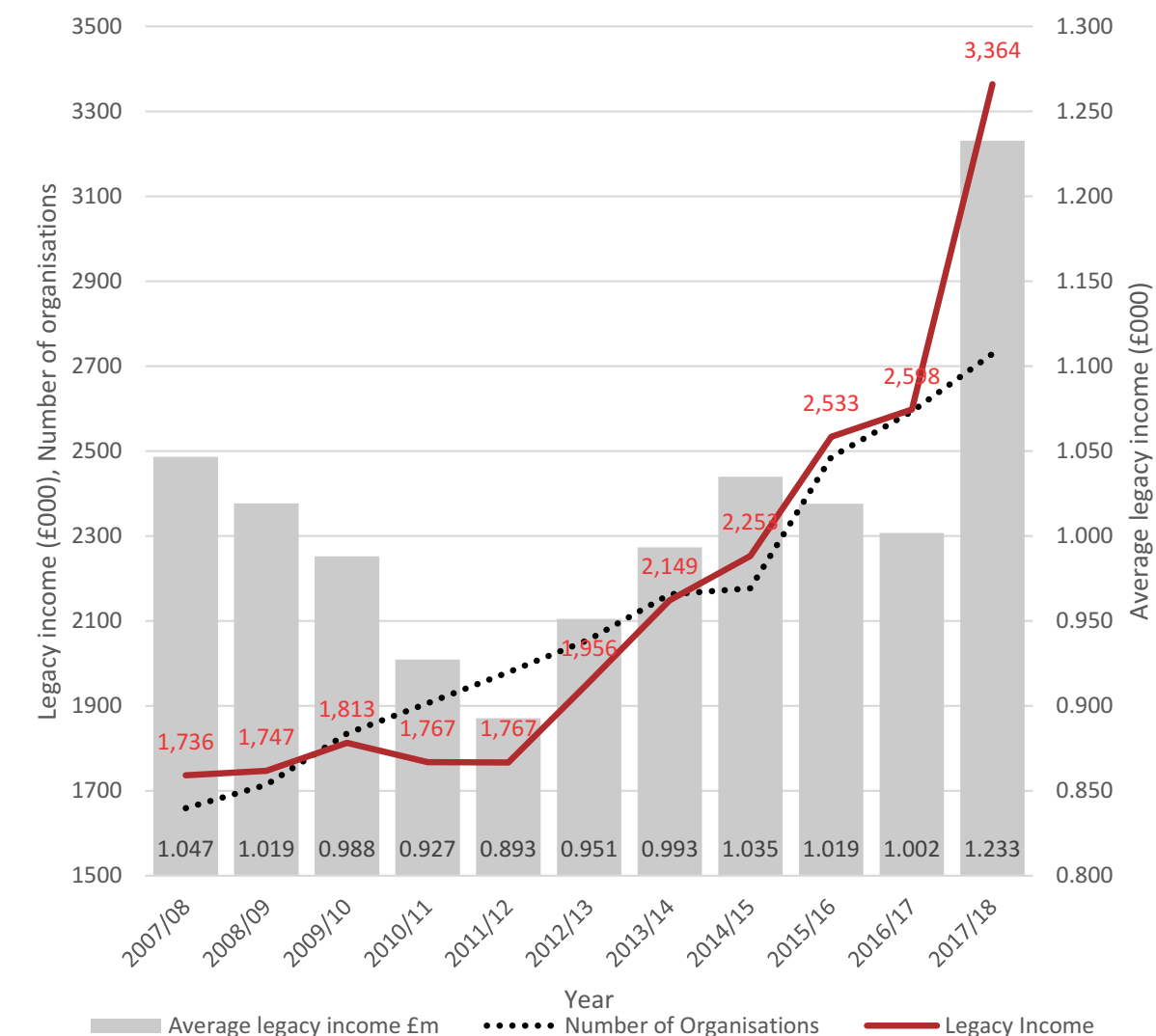
- Legacy income has reached a new milestone and is now worth over £3 billion, the largest ever reported
- There were 37,856 charitable estates in 2018, an increase on the 37,364 reported for 2017.
- Charitable estates were worth £17.9 billion in 2018, less than the £18.4 billion we have recorded for 2017 which will slow down the growth of residual values
- 16.7% of the value of charitable estates (donor wealth) went to charities
- 6.3% of the population leave a bequest in a Will
- A total of 123,235 bequests were recorded in Wills during 2018, an increase from 122,849 recorded in 2017
- The typical profile of a legator is:
 - Female
 - Aged 77 when she writes her Will
 - Dies when she is 89
 - Lives in the South of England
 - Leaves three charitable bequests in her Will
- 36.3% of charitable Wills contained just one bequest compared to 34.7% of charitable Wills in 2017 — 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 for the very first time, legacy income has exceeded £3 billion. It is true that year-on-year growth has slowed but finally, aggregate legacy values have reached this milestone. This means that 3.9% of total sector income is derived from this revenue stream, financially supporting countless projects across all causes throughout the sector.

You will notice from the graph below that we are reporting total legacy income currently standing at £3.364 billion. However, this includes a massive legacy of £435m to The Capricorn Foundation which has inflated the growth and average value of legacy income for 2018.

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 to £3.4 billion in 2017/18. The number of charities reporting legacy income has also increased from 1,659 organisations in 2007/08 to 2,729 organisations in 2017/18. Part of this rise is due to the increased number of charities reporting legacy income, as the number of charities with income greater than £500k generally increases year-on-year. Just over one in five charities receive legacy income, where the total income exceeds £500,000.

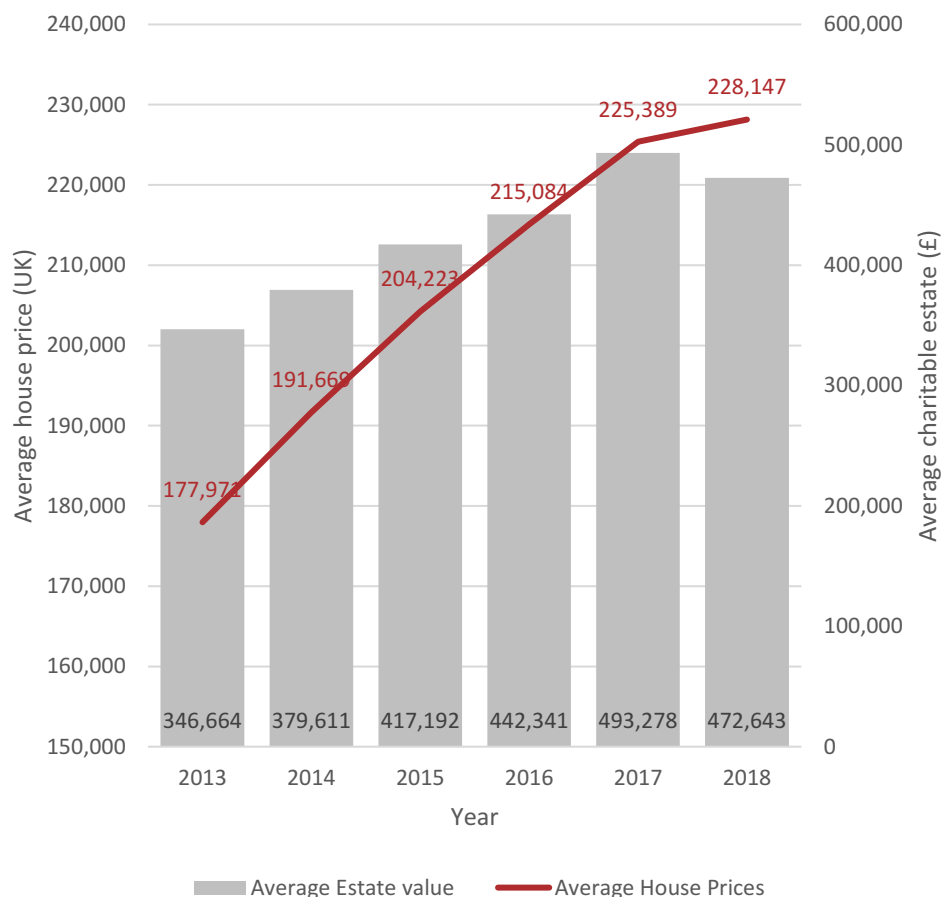
Legacy income drivers

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 economic recession when the housing market plummeted. This had a negative effect on legacy income and is reflected in Figure 1. This shows that 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 2018 and 90% came from residuaries, 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. Note that for the first time in recent years the average estate value for charitable estates has decreased which can be explained by the drop in house prices during 2018. Although the number of charitable estates increased in 2018 the total value of charitable estates fell from £18.4 billion to £17.9 billion. This has had a negative impact on legacy values. Cancer Research UK is generally a good barometer on the legacy market but in 2018 saw legacy income reduce for the first time in several years.

Another driver is the number of annual deaths. The more deaths there are in any year, generally the greater the number of charitable estates. We have seen an increase in the number of annual deaths in the UK in recent years which has helped to increase both the number of charitable estates and aggregate legacy values.

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



Source: Smee & Ford 2019 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 £1.6 billion. However, this year we have an anomaly with the Capricorn Foundation receiving the most, due to the bequest of the Ramsbury Manor estate being left to charity. Of the top 25, nine saw legacy income decrease when compared to the previous year.

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

Charity	Year End	Legacy income (latest year £m)	Legacy income (previous year £m)	Legacy income (Year 3 £m)	Legacy income (Year 4 £m)	Legacy income (Year 5 £m)	Total Legacy income (5 years £m)
Capricorn Foundation, The	05/04/18	435.319	-	-	-	-	435.319
Cancer Research UK	31/03/18	181.500	186.600	177.800	166.800	163.100	875.800
Royal National Lifeboat Institution	31/12/17	135.100	130.500	118.500	114.300	118.400	616.800
Macmillan Cancer Support	31/12/17	84.538	76.754	63.850	61.984	59.188	346.314
British Heart Foundation	31/03/18	83.400	73.300	67.000	60.800	55.500	340.000
RSPCA	31/12/17	77.065	78.613	63.138	67.207	61.966	347.989
Salvation Army Trust	31/03/18	63.639	50.483	51.974	43.865	47.870	257.831
National Trust, The	28/02/18	51.938	61.693	51.556	50.538	45.914	261.639
PDSA	31/12/17	45.755	45.135	39.514	42.829	40.612	213.845
Guide Dogs for the Blind Association	31/12/17	43.700	47.900	44.300	34.300	33.700	203.900
Royal National Institute of Blind People	31/03/18	41.919	41.730	37.396	33.977	40.797	195.819
Dogs Trust	31/12/17	34.919	30.395	26.716	24.996	20.090	137.116
Basil Larsen 1999 Charitable Trust	05/04/15	34.764	-	-	-	-	34.764
Marie Curie Cancer Care	31/03/18	34.459	33.212	28.735	26.750	26.415	149.571
Charities Aid Foundation	30/04/18	33.557	23.875	35.463	0.000	0.000	92.895
Cats Protection	31/12/18	31.551	30.001	26.129	30.529	24.202	142.412
British Red Cross Society, The	31/12/17	31.300	30.900	32.600	22.200	21.800	138.800
Honor Frost Charitable Trust	30/09/12	30.461	-	-	-	-	30.461
RSPB	31/03/18	30.441	34.699	34.062	30.579	30.399	160.180
Age UK	31/03/18	29.487	27.578	25.643	24.732	22.055	129.495
Great Ormond Street Hospital	31/03/18	26.251	14.111	17.828	22.059	11.460	91.709
Donkey Sanctuary, The	31/12/17	23.304	24.841	22.505	20.769	19.957	111.376
Royal British Legion, The	30/09/17	21.650	20.308	18.026	16.038	12.596	88.618
NSPCC	31/03/18	21.512	25.079	23.350	21.372	20.909	112.222
Leonard Cheshire Disability	31/03/18	21.359	7.211	7.320	7.275	4.533	47.698

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 when the Capricorn Foundation is excluded.

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

Charity	Year End	Legacy income (latest year £m)	Legacy income (previous year £m)	Annual change
Capricorn Foundation, The	05/04/2018	435.319	0.000	435.319
Leonard Cheshire Disability	31/03/2018	21.359	7.211	14.148
Salvation Army Trust	31/03/2018	63.639	50.483	13.156
Great Ormond Street Hospital Children's Charity	31/03/2018	26.251	14.111	12.140
British Heart Foundation	31/03/2018	83.400	73.300	10.100
Charities Aid Foundation	30/04/2018	33.557	23.875	9.682
Macmillan Cancer Support	31/12/2017	84.538	76.754	7.784
Parkinson's Disease Society of the United Kingdom	31/12/2017	17.660	12.355	5.305
Hobson Charity Limited, The	31/03/2018	5.000	0.000	5.000
Royal Marsden Cancer Charity	31/03/2018	6.797	1.955	4.842
JNF Charitable Trust	31/12/2017	7.079	2.387	4.692
Royal National Lifeboat Institution	31/12/2017	135.100	130.500	4.600
Dogs Trust	31/12/2017	34.919	30.395	4.524
Diabetes UK	31/12/2017	16.763	12.531	4.232
Shrewsbury Roman Catholic Diocesan Trust	31/03/2018	4.318	0.351	3.967
Martlets Hospice Limited, The	31/03/2018	5.346	1.395	3.951
Salford Diocesan Trust, The	31/12/2017	4.730	0.890	3.840
Watch Tower Bible and Tract Society of Britain, The	31/08/2017	6.006	2.224	3.782
Arthritis Research UK	31/03/2018	18.367	14.586	3.781
WWF UK	30/06/2018	15.460	11.874	3.586
British Limbless Ex-Service Men's Association	31/12/2017	5.779	2.438	3.341
North London Hospice	31/03/2018	4.186	0.918	3.268
National Trust for Scotland, The	28/02/2018	7.106	3.957	3.149
Dominican Council	30/09/2017	3.112	0.089	3.023
ABF The Soldiers Charity	31/03/2018	8.235	5.274	2.961

Source: Charity Financials

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

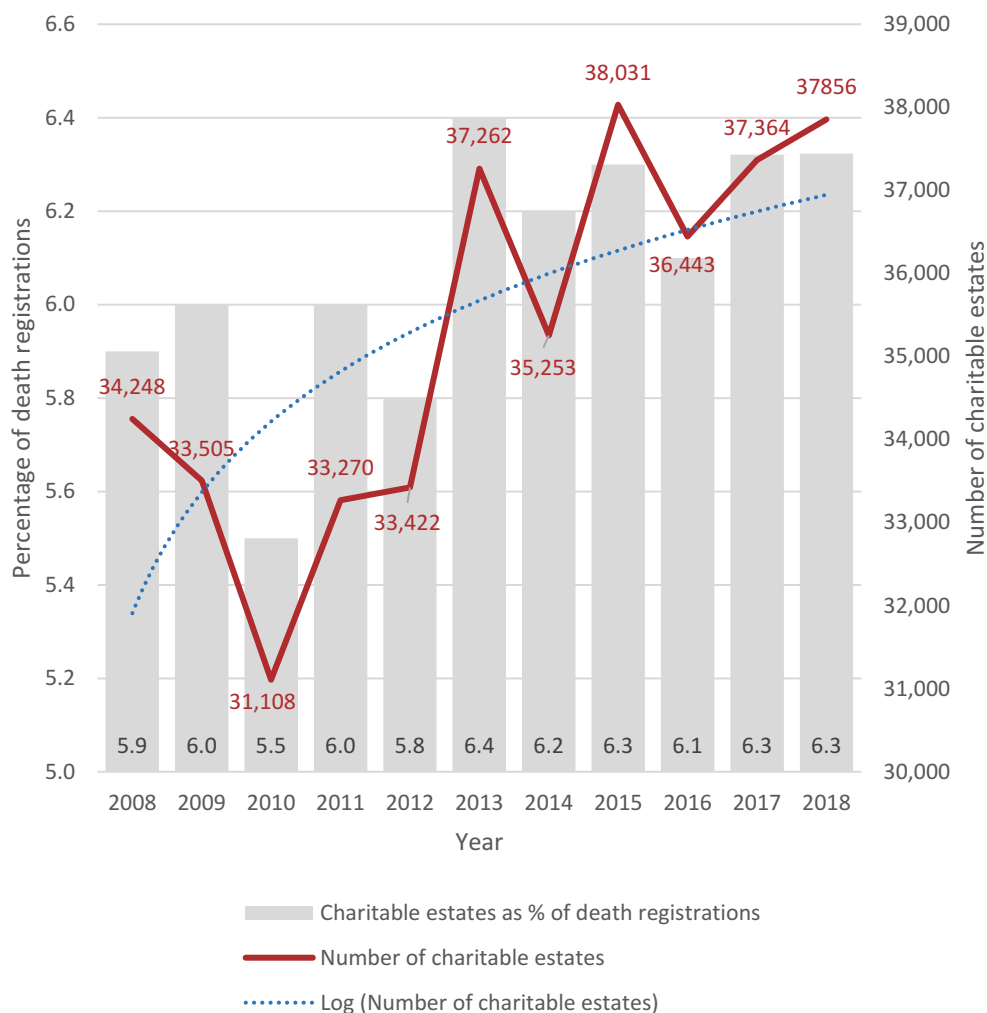
If we consider that charitable estates were worth £17.9 billion in 2018, and legacy income was worth £3 billion, we can calculate that 16.7% of the net worth went to charities. Applying this percentage to the total estate values for non-charitable estates (i.e. those that do not contain a gift to charity), legacies could potentially be worth another £10.9 billion to the sector.

If we can convert just one percent of non-charitable estates to charitable, we can raise another £109 million each year for charities.

Using the total number of probated estates in 2018, if just one per cent of those people included a gift to charity in their Will, it would have raised an additional £109 million for charities.

The number of charitable estates recorded by Smee & Ford fluctuates annually and is generally somewhere between 30,000 and 38,000. Figure 3 shows that in 2015 Smee & Ford recorded the most charitable estates over the past 10 years, with 38,031 estates identified. In 2016 this dropped to 36,443 and in 2017 increased to 37,364 estates. In 2018 the number of charitable estates increased again to 37,856 which is the second highest ever recorded by Smee & Ford. This growth represents a 1.3% annual increase.

Figure 3: Historic trends in number of charitable estates



Source: Smee & Ford 2019 Legacy Trends

Using death statistics supplied by the ONS (Office for National Statistics) we can calculate the percentage of the dying population which are charitable in Wills. In 2012 and the years preceding, the percentage of the population that were charitable in Wills was 6% or below on an annual basis. However, from 2013 the percentage has consistently been higher than 6%.

Figure 3 shows the positive correlation between the number of charitable estates and time (in years).

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

Using the 2018 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 84 (although the most common age is 89)
- The lapse between the date of Will and date of death is 7 years and 2 months
- Lives in the South of England
- Leaves 3.4 bequests to charity

'Legators are likely to be female'

About 60% of legators are female, however gender splits do vary considerably by cause or individual charity. 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 last Will'

Although the average age for female legators writing their Will 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'

People 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 less 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.

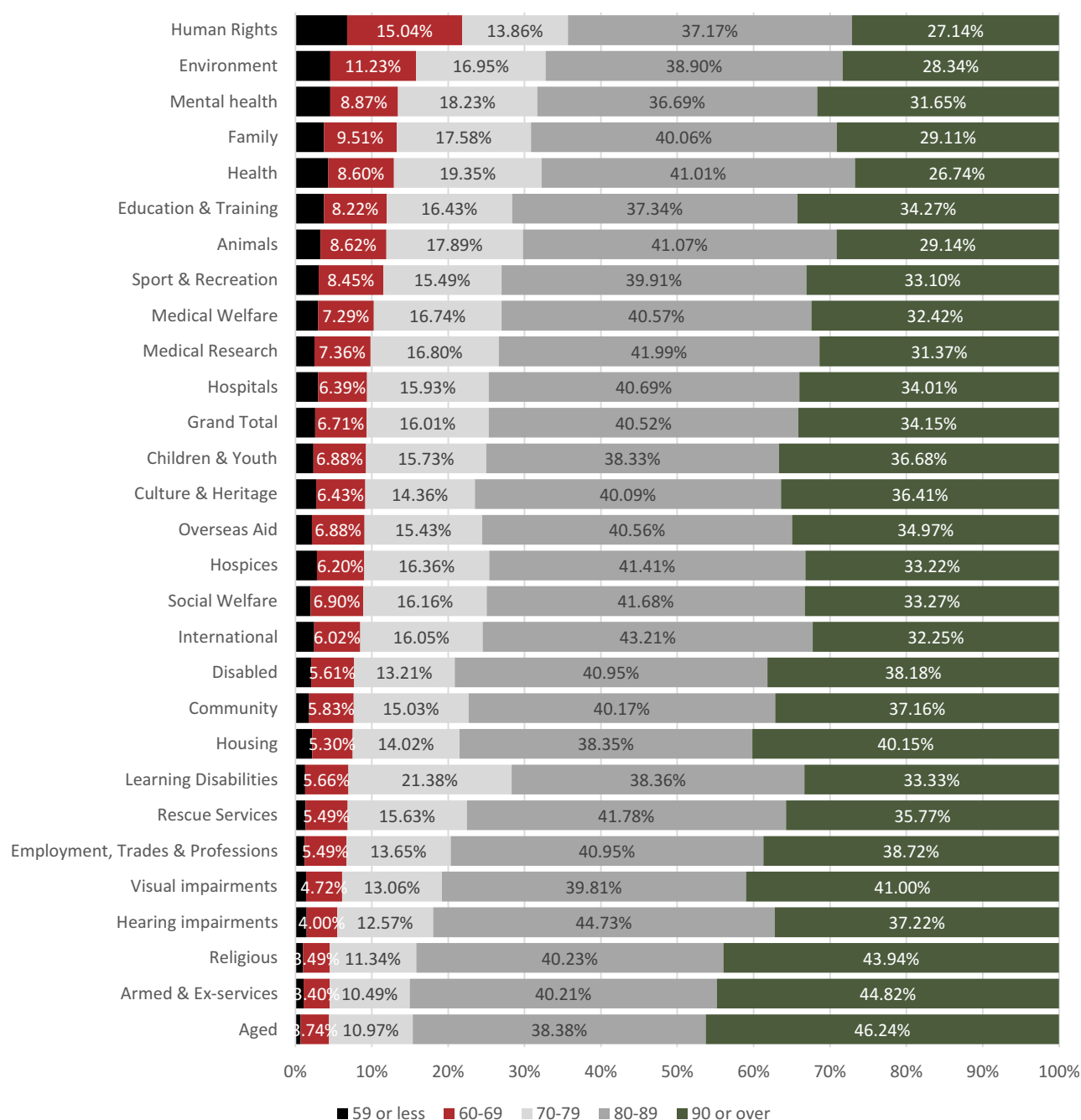
Research suggests that people write several versions of their Will but are likely to keep a lot of the content throughout the various permeations. This means that if you can target people writing their first Will and manage to secure a legacy in that Will, even if they re-write their Will when their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

6. What causes are popular and how does this change with different age groups?

If you are going to segment your donor database, one of the most interesting things to look at is what causes are popular with which age groups (see Figure 4). For charities working across several 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 messaging 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 4: Legacy gifts by cause and age at death

Source: Smee & Ford 2019 Legacy Trends

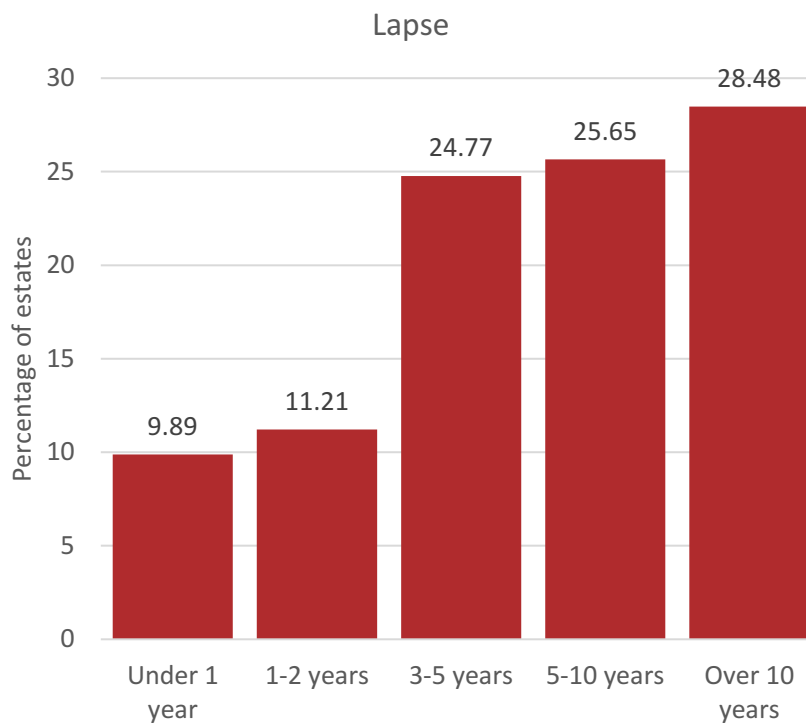
'There is an average 6.5 years between date of last Will and date of death'

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 (the time between writing of the last will and the date of death). Assuming you have a significant number of legators over the period, you can then use this to determine when legacies might come in. Alternatively, you can group the lapse times into individual bands so that you can calculate what

percentage could be expected at different times in the future. 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. Below we have banded all estates for 2018 into lapse bands which covers all causes.

Figure 5: Lapse bands for charitable estates 2018



Source: Smee & Ford 2019 Legacy Trends

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.

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

'Most legators come from the South of England'

This may seem obvious 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 to 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 and represents 13.4% of the UK population, only created 4% of charitable estates in 2018. Figure 7 shows the percentage of charitable estates by county.



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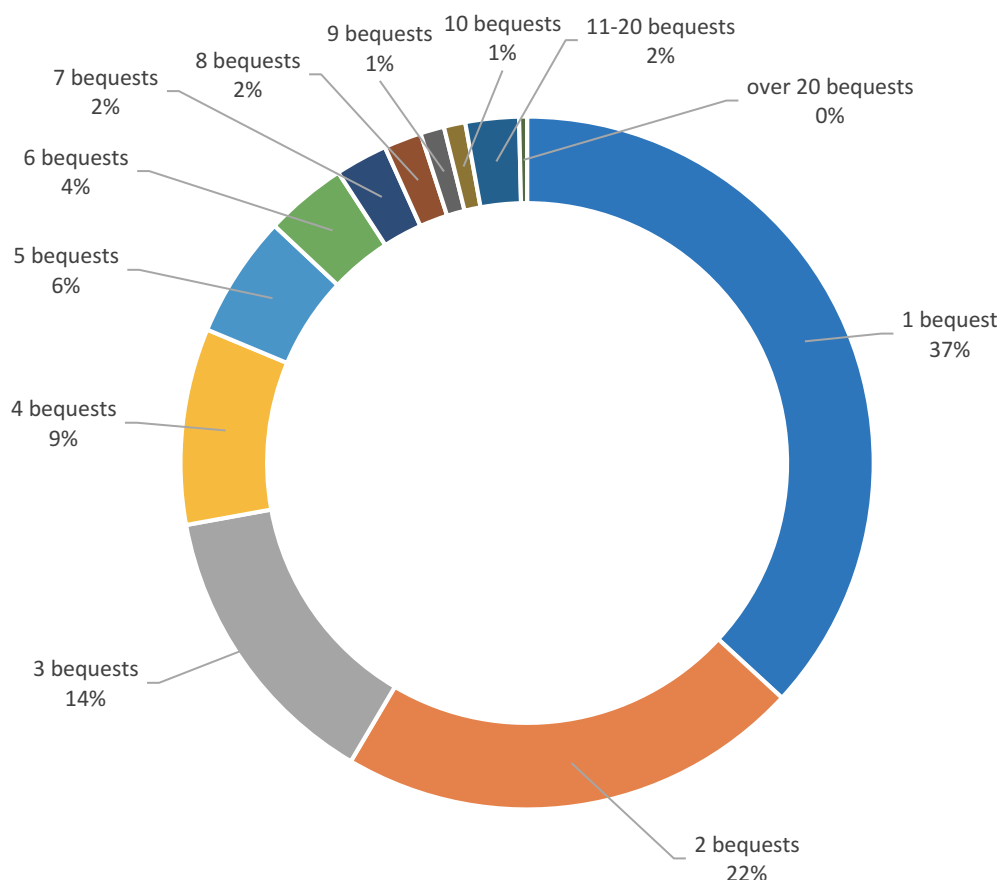
'Charitable Wills contain 3.4 bequests'

The average number of bequests per charitable will was 3.4 in 2018, although the actual numbers vary significantly. Last year the largest number of single bequests made in a Will was 216!

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 37% of all charitable Wills in 2018 – 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.

Interestingly, 37% of bequests were made with a sole beneficiary, containing only one charity. This could raise questions when looking into the data for your own charity. When a bequest to your organisation contains no co-beneficiaries what types of bequests are generally made? Are the values greater for these bequests? When there isn't a co-beneficiary and a residual bequest is made, are the percentages greater than those which do contain a co-beneficiary?

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



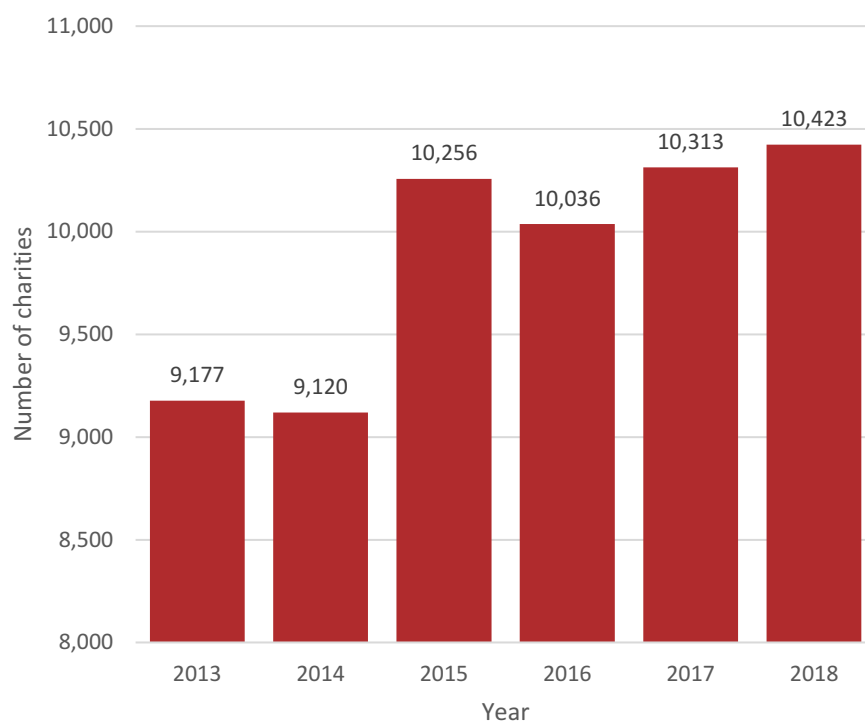
Source: Smee & Ford 2019 Legacy Trends

Analysis from Smee & Ford's data services 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.

How many organisations are mentioned annually in Wills?

As Smee and Ford record every named charity in every Will we can calculate how many charities are mentioned on an annual basis and the results are shown in figure 8. Over the last four years we have recorded in excess of 10,000 individual charitable organisations mentioned in Wills and in 2018 we recorded the highest number with 10,423. The legacy giants such as CRUK or the RNLI are mentioned in a few thousand Wills per annum, but a large percentage of charities are only mentioned once.

Figure 8: Number of individual charities named in Wills



Source: Smee & Ford 2019 Legacy Trends

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 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 that 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 system of CRM 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 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. 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, 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 '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. 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 recognise 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.

To find out how data can inform your legacy strategy, please complete the form below and our team will be in touch with further details on our Legacy Insight Solutions.

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 Business Development Manager for more information:

Thomas Gibbs
Business Development Manager
Tel: 020 7374 5248
Email: thomas.gibbs@wilmingtonplc.com

Legacy Insight Solutions

Identify

Boost your legacy income by identifying opportunities & trends

Compare

Benchmark against peer charities in your causal area and across the sector

Analyse

Inform your strategy using the UK's most comprehensive legacy data

Contact Thomas.gibbs@wilmingtonplc.com to find out more

www.smeeandford.com