

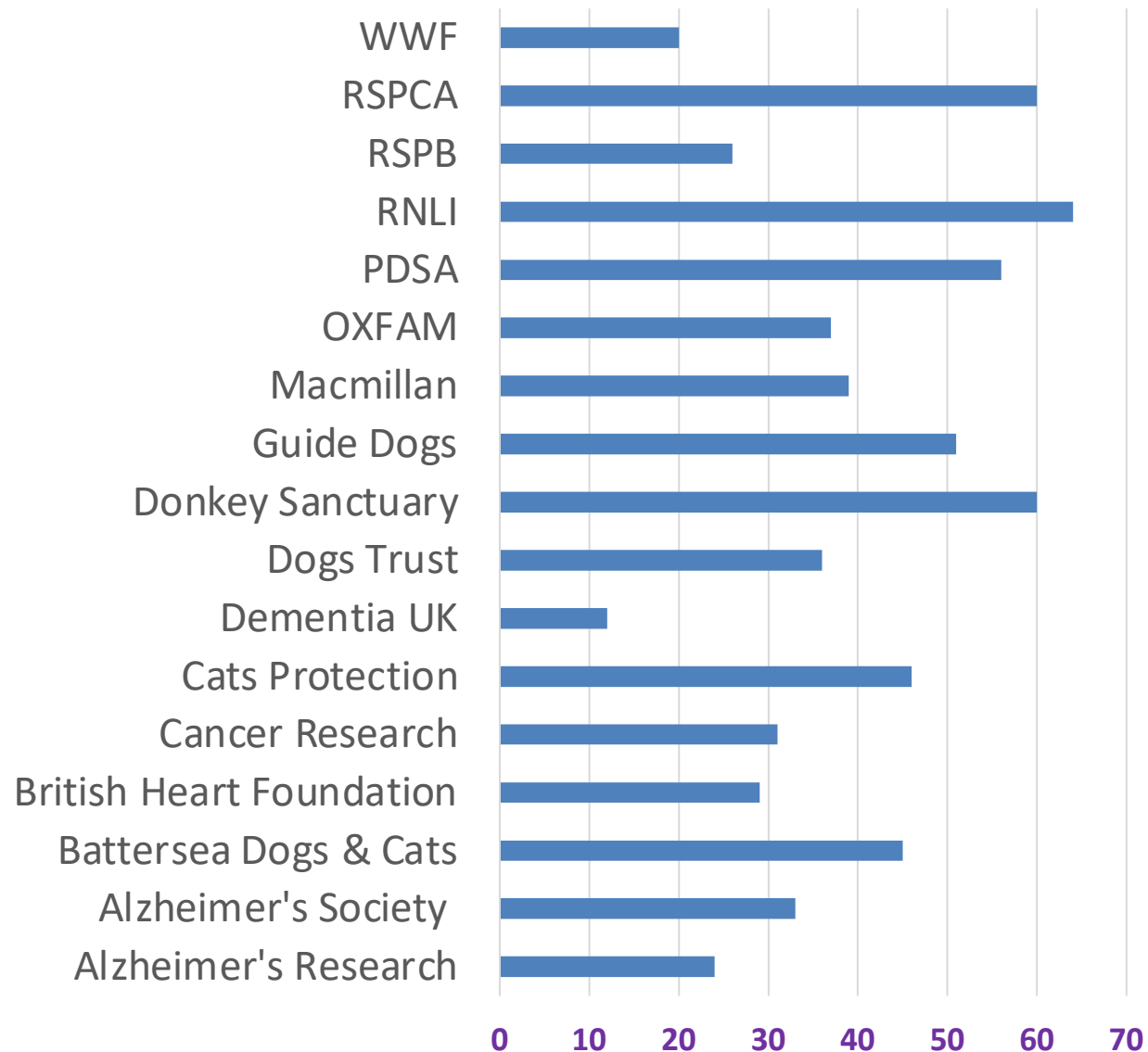


*keep*pace

Legacy Stewardship



Legacy income % of all income 2021



Why stewardship is important?

Reminder of the percentage of legacy income.



£3.7 Billion

Up nearly 10% again

2000 new charities

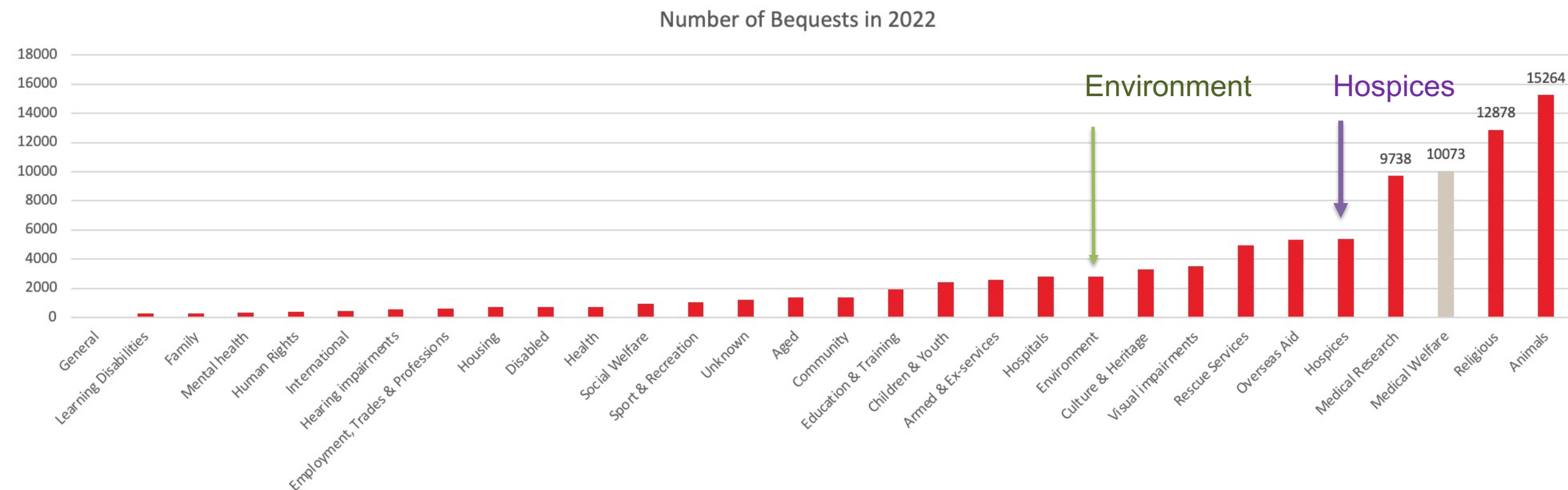
**More to charities
with total income
under £0.5m**

Smee & Ford Legacy Trends report 2023

2022 was a record-breaking year for legacy income to charities.

Requests by cause

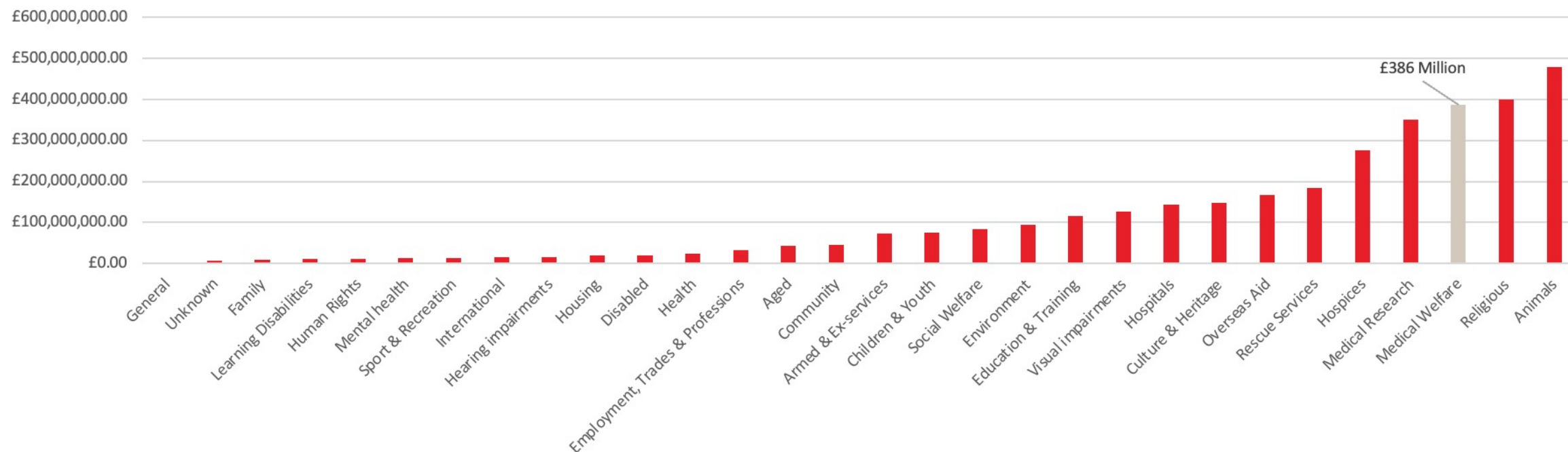
In 2022, animal charities received the most bequests, closely followed by religious organisations, medical welfare and medical research. Medical Welfare were the 3rd strongest performer in the sector.



Bequest values by cause

In 2022, animal charities received the highest value of bequests, closely followed by religious organisations, medical welfare, and medical research. Medical Welfare were the 3rd strongest performer in the sector.

Bequest Values by Cause in 2022





STEWARDING -

Give me a...

S

Setting your stall out...

S

Sing from the same song sheet...

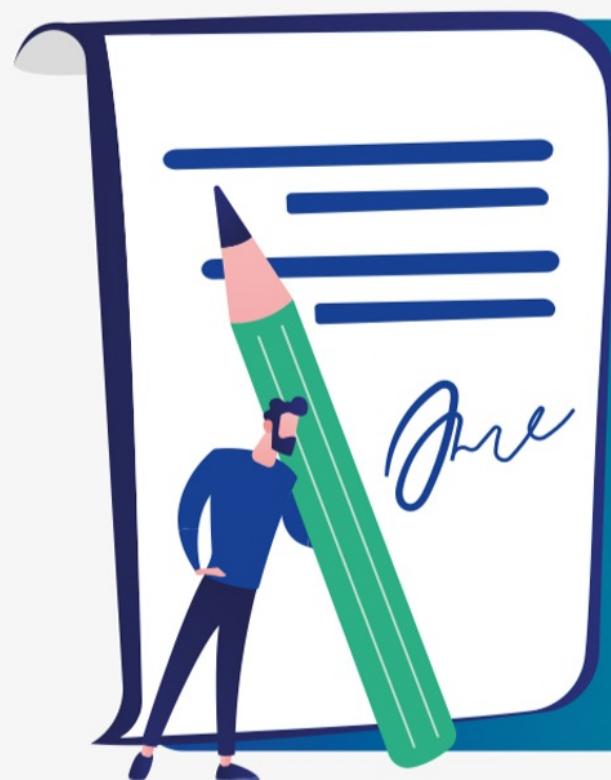
Both Internally and externally

Case studies make this clear



DiABETES UK

KNOW DIABETES. FIGHT DIABETES.

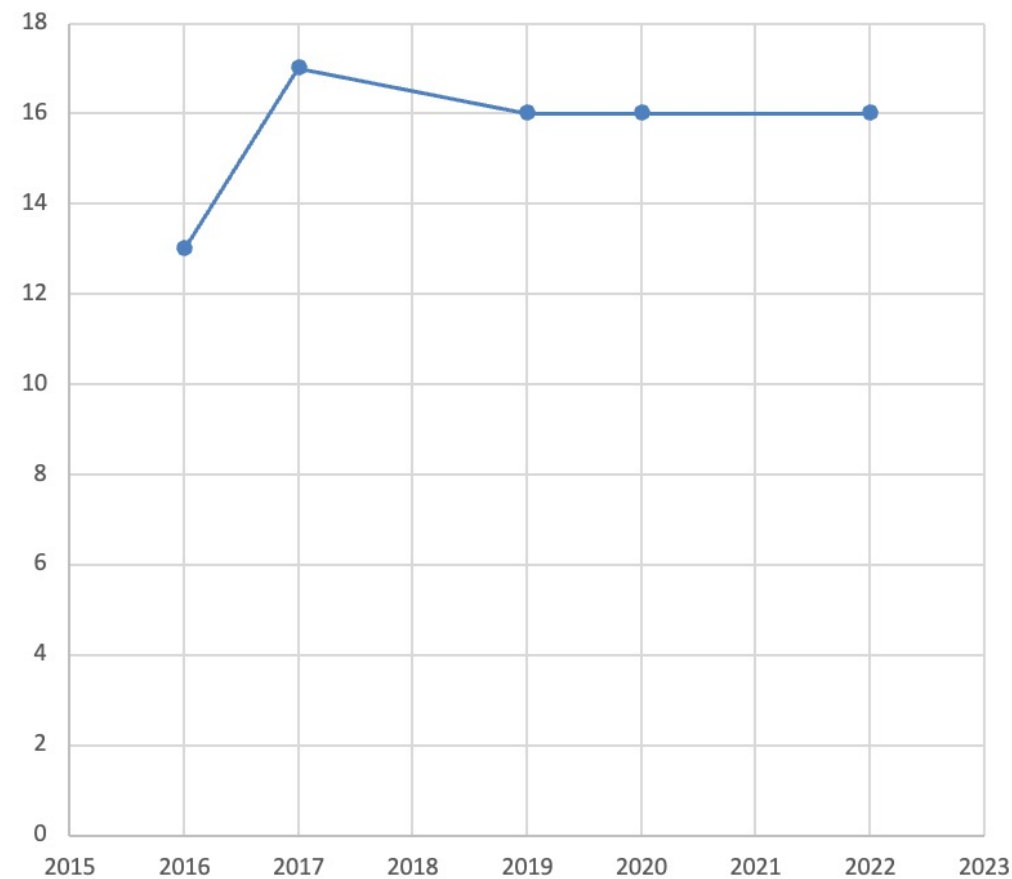


Over the past 20 years,
the average proportion
of Wills that include
a charitable gift has

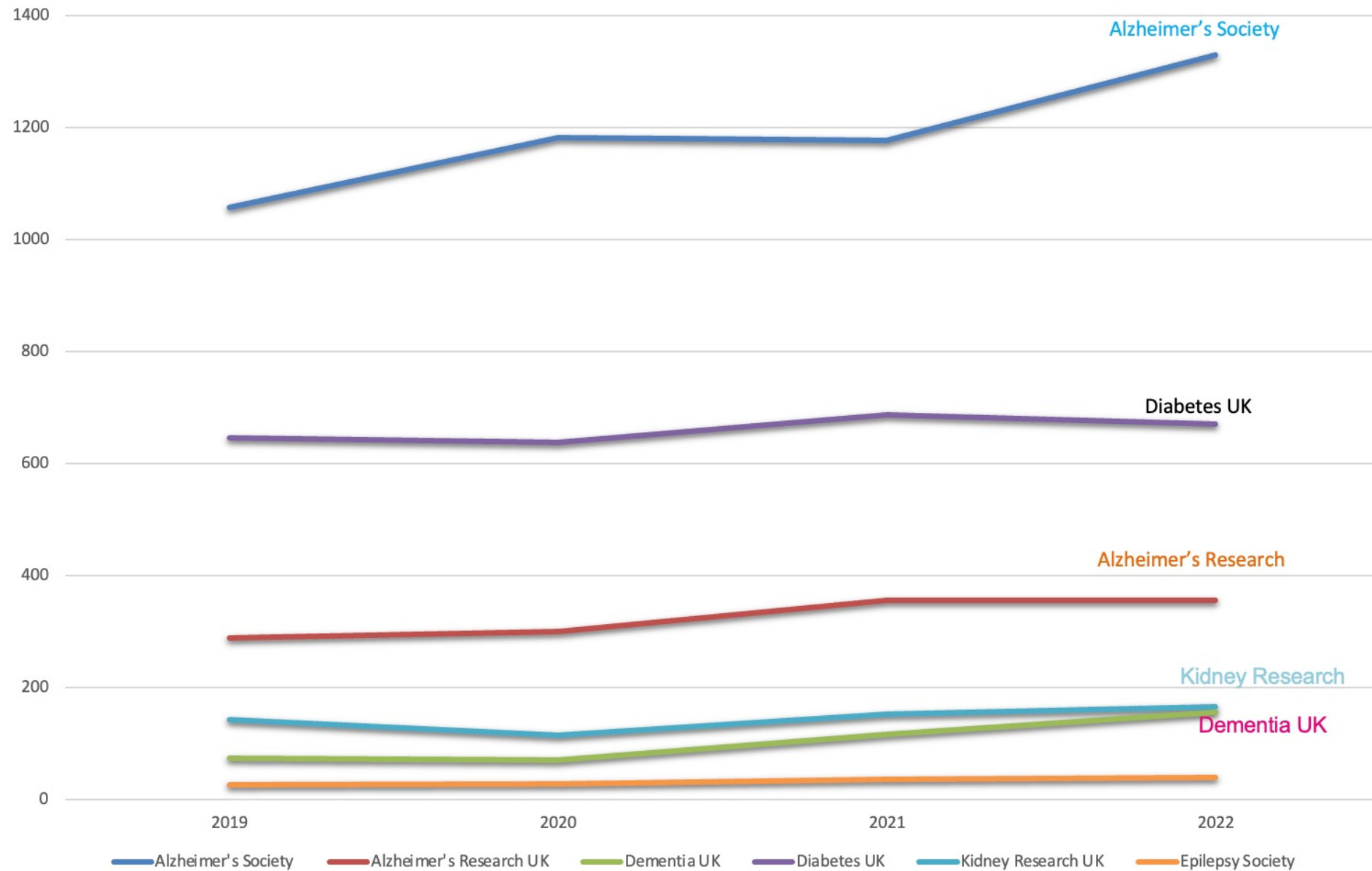
**risen
by 24%⁵**

with legacy donations
now included in 16%
(one in six) probated Wills

Diabetes UK Legacy Income % of overall



Number of Gifts

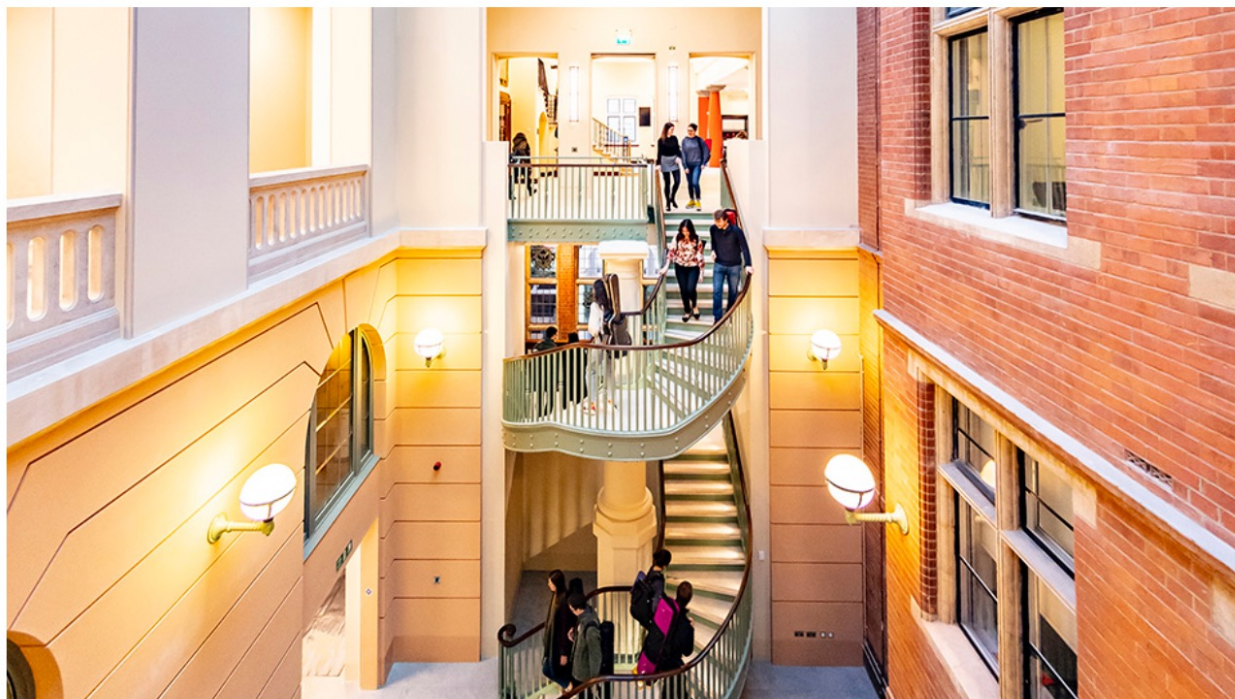




s**T**EWARDING -

T
Tell stories

....of gratitude and impact



The staircase in the Cotes-Burgan Atrium



Celia and Frederick Burgan



St Ann's Hospice

every day makes a difference

Anne loves to talk, both in her personal life with friends, and in her professional life as a receptionist at the hospice.

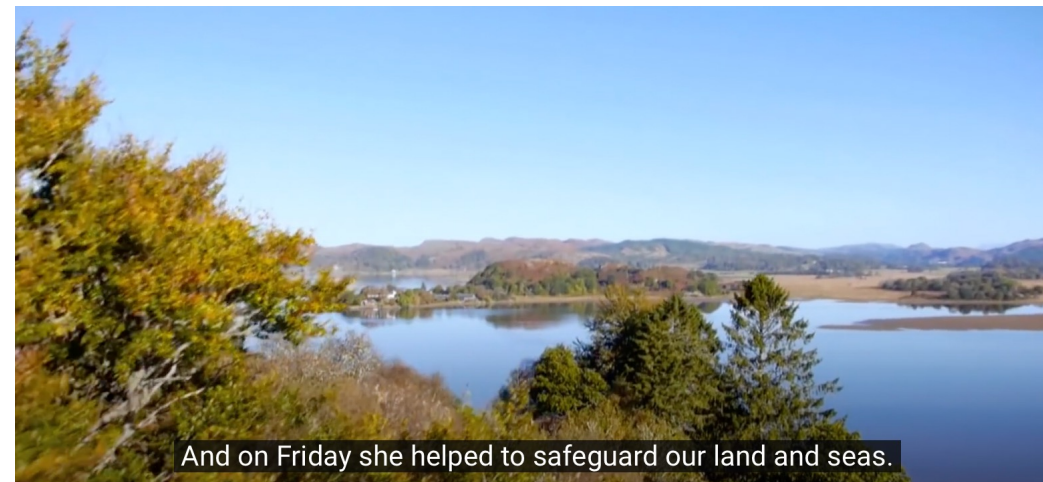
She's seen first-hand the difference that talking can make to the patients that St Ann's cares for, and has given that gift to Kathy, even though Kathy does not know.

Thanks to the donation Anne will leave in her Will, patients like Kathy will be able to talk to our specialist nurses, doctors and counselling teams about how they're feeling. When you have a life-limiting illness, it makes a real difference to know someone is listening who cares and can support you.



Anne and Kathy...







ST**E**WARDING -

E

Everyone is your audience

....legacy first and last

Traditional
way a Legacy
supporter
journey was
looked at...



Case Study





STE**W**ARDING -

W

Welcome people to your mission

...we like to be part of a thing.

| This is me...





STEW**A**RDING -

A

Acknowledge impact

Case Study

6 in 10 launches

**A gift in your Will is our
protection at sea**



Your legacy could help lifeboat crews save lives at sea.



STEWARDING -

R


Recognise...



STEWAR**D**ING -

D

Demonstrate longevity...



Time is running out

We **urgently** need your help to find and test everyone living with HIV in the UK.

Donate now and together we can end new cases of HIV in the UK by 2030.





STEWAR|NG -

|

Involve all stakeholders,
including donor families



STEWDA**R**ING -

N

Notice significant
occasions



STEWARDIN**G** -

G

Get together

97% of all charities in the UK raise <£1m

**In 2022 there were
10,627 unique charitable
organisations
mentioned in Wills** which
is the second highest we have
recorded over the past decade.

Smee&Ford

Share of total
fundraising spend

Share of total
voluntary income



Legacy marketing spend

Legacy income

Legacy marketing spend is
4.6%
of total fundraising spend but
legacy income is
44%
of voluntary income

Legacy Marketing Benchmarking 2020/21, 29 charities



Legacy Marketing Benchmarking 2020/21



Stewardship.



Audience – hot
and cold



Assumptions



Accuracy

Four pillars of Legacy Fundraising



- 1) Clear Messages
- 2) Consistent Communication
- 3) Celebration
- 4) Administration



It is about WOW...

- **Wish** - Communicate you gratefully accept gifts in **Wills**.
- **Ownership** -Create **opportunities** to talk.
- **Wonder** -Acknowledge **Will Power**.

