



MakeAWillOnline
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Legacy Loop

Live

July

Welcome

Thank you for joining us for this relaxed, informal collaborative session which aims to fill you with inspiration

We are also joined by a couple of our past Legacy Loop presenters, **Paul Browne** and **Chris Lincoln** who will be sharing their insights too

While some of our partners couldn't join us today, they've kindly shared their **Legacy News from Afar** so we can all benefit from their experiences



Networking

This is your chance to:

- Celebrate your successes
- Explore what's worked (and what hasn't)
- Pick up practical inspiration from others in the sector



Show and Tell

Let's discuss to explore together:

- **Legacy Messages**
What's your approach to legacy messaging? What channels are you using? How are you making your ask stand out?
- **Engagement Ideas**
Whether it's a stewardship event, a clever supporter touchpoint or sharing powerful research - what are you doing to engage pledgers, intenders or legacy prospects?
- **Success Stories**
From standout campaigns to small wins with big impact, we want to hear what's gone well in your legacy fundraising.



Show & Tell – Legacy Messaging

North Wales Wildlife Trust: Refreshing Legacy Messaging

This year, NWWT have taken a fresh, informal approach to legacy messaging.

Moving away from traditional imagery and emotional appeals, they're using humorous cartoons and playful design.

Legacy materials like bookmarks (Spring) and Z-fold leaflets (Summer) are designed to spark curiosity rather than tug heartstrings.

Messaging is being rolled out across print, corporate staff channels, and adapted for social media.

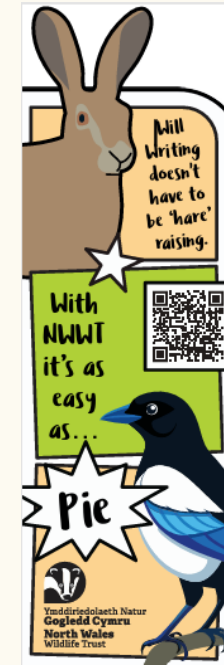
Early indicators (tracked via QR codes) show a promising increase in new pledges.

Takeaway Tip:

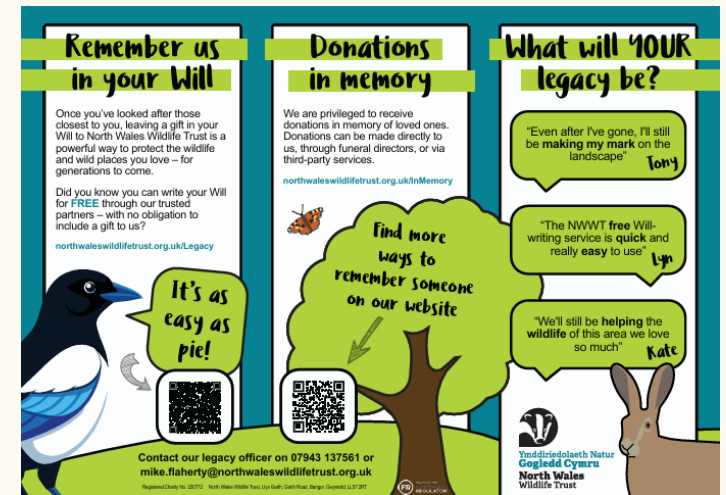
“Don’t be afraid to break the mould – a light-hearted, creative message can still drive serious results.”

Mike Flaherty, Legacy Officer, North Wales Wildlife Trust

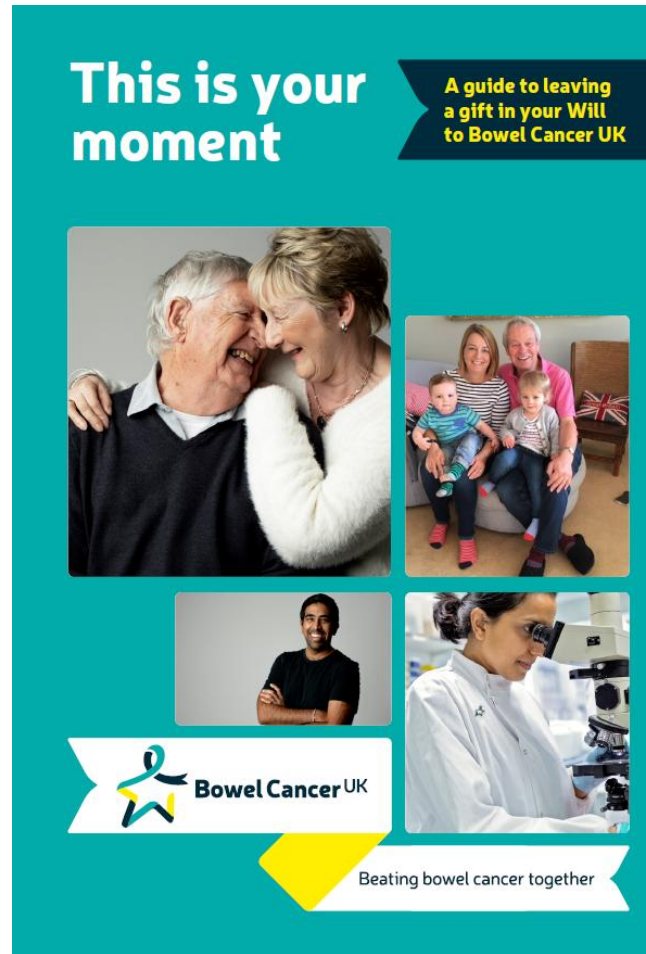
Sorry I cannot be there – but next time!



**Ymddiriedolaeth Natur
Gogledd Cymru**
**North Wales
Wildlife Trust**

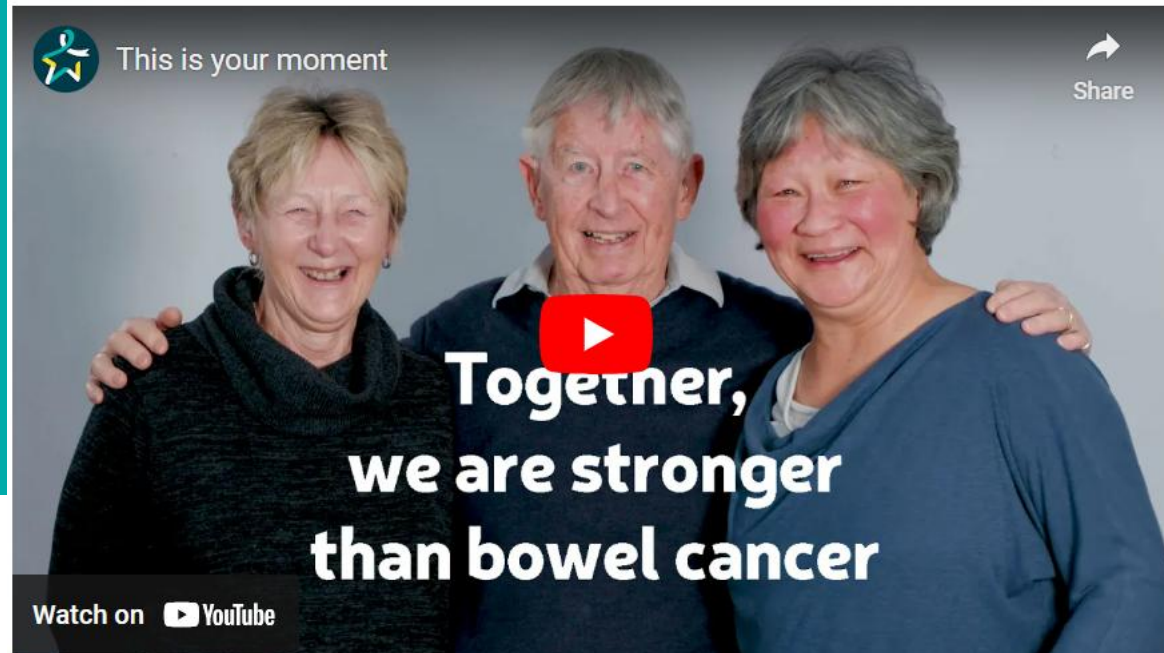


Why we needed a refresh



- We felt an update was needed on our theme
- New key messaging
- New Video
- New guide
- New promotional leaflet

Now is our moment to act, and rid the world of bowel cancer forever. And by leaving us a gift in your Will, no matter the size, you will help us do it.



Key Messaging



Inspiration



Impact



Community



Simplicity

Key Messaging

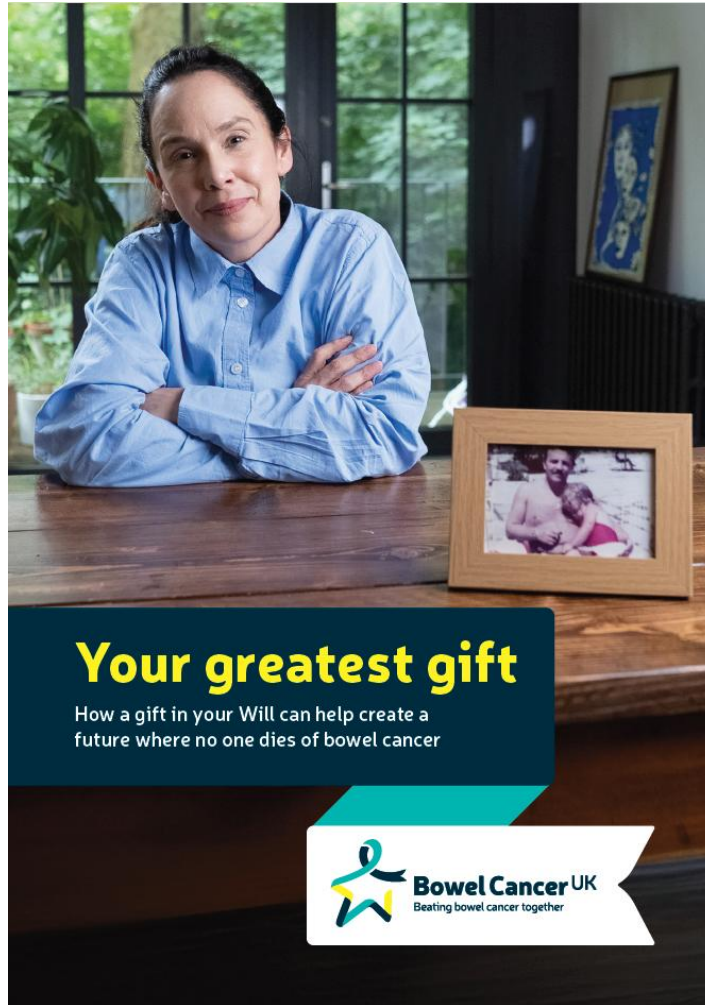
- Two over-arching messages:

“Leaving a gift in your Will is the greatest gift you can give”

“Once you’ve taken care of your loved ones, please consider leaving a gift to Bowel Cancer UK”

We’ve undertaken lots of small changes to our legacy activity and hard launched the materials this March. We’re seeing the most referrals and enquiries we ever have in the past 18 months, so it’s been a really positive time for legacies! **Matt Wright – Bowel Cancer UK**

Gifts in Wills Guide



- Increased size from 8 to 16 pages
- More focused on case studies, with all three powerful stories throughout the guide
- Ensured we homed in on ‘the greatest gift’ theme throughout

What will your greatest gift be?

Life is full of gifts. Not the ones we wrap, but the gifts of love and kindness we receive from family and friends.

If you're reading this, it's likely bowel cancer has affected your life in some way.

And I want to show you why leaving a gift in your Will to Bowel Cancer UK is the greatest gift you can give.

Your gift will mean more people are told: "We've found it early, it's going to be OK." It will mean more people hear the words "all clear". And it will give more people with bowel cancer the chance to live a long, happy life.

A gift in your Will to Bowel Cancer UK will last for generations. It's also very easy – and we've got all the information you need inside this guide.

Thank you,

Matt
Matt Wright,
Supporter Retention Manager
Bowel Cancer UK

Your gift will help us create a future where no one dies of bowel cancer

“We're making real progress, but there's so much more to do. **Our greatest gift will be to fund research** that improves early diagnosis and treatment of bowel cancer – bringing us closer to the day when nobody dies of the disease.

Dr Reena Morjaria
Head of Research, Bowel Cancer UK



Gifts in Wills Guide



My greatest gift

for Jane



Chris, whose wife Jane died of bowel cancer

"I promised Jane I would leave a gift to Bowel Cancer UK as part of our legacy after she passed away.

From first-hand experience, I can say that bowel cancer is extremely traumatic for both the patient and loved ones. It's not as high profile as other forms of cancer, but the effects are just as deadly. We both realised this, and wanted to play our part by leaving this gift in my Will.

It's obviously too late for Jane, but we both wanted to help others in the future. None of us know what's around the corner. You will be helping someone close to you, and someone you don't even know.

Leaving a gift to charity is so gratifying and loved ones should be proud of you for doing so. Please don't hesitate to leave a charitable gift. You'll be glad you did, as it will be put to great use."



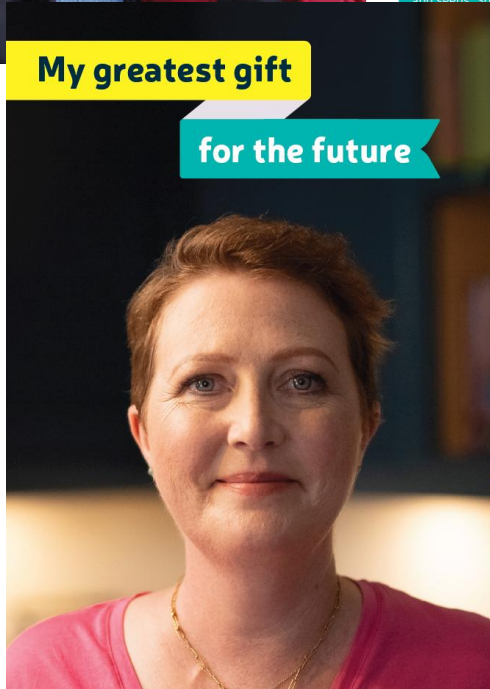
Jane's greatest gift for me

"Jane was a great wife, mother, grandmother. She put everyone before herself. She taught her grandchildren how to play games, bake, plant flowers and seeds. She kept everybody together."



My greatest gift

for the future



Sarah, diagnosed with stage 4 bowel cancer

"My gift is a way of giving back for the support I've received, and it's a gift for the future too.

Bowel Cancer UK is doing really important work and I want that to continue. I hope that my legacy will mean that more people can live longer with stage 4 bowel cancer.

My husband and children are doing so much amazing fundraising, and this legacy

makes me feel like I can do something too.

Leaving a gift in my Will was so easy. I didn't feel any pressure, and I knew that whatever I donated would be valued.

I also really liked that the free Will writing service was so quick and flexible – so I know I can always go back in and change the amount if I wish."



Mum's greatest gift for us

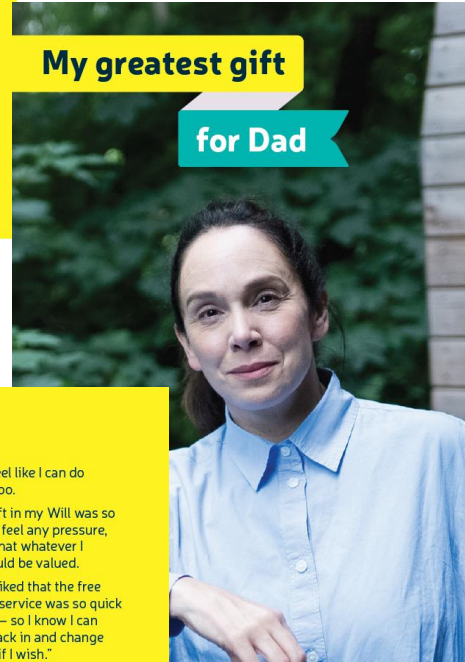
"My mum's a really kind, caring person, and chooses other people over herself. She knows how to help me when I'm sad, and cheer me up."

Eva, 12



My greatest gift

for Dad



Charlie, whose dad Larry died of bowel cancer

"I was very close to my dad. Leaving a gift in my Will to Bowel Cancer UK is a beautiful tribute to him and will be my parting gift.

And this way, I hope someone else's dad can benefit.

Writing my Will was a very positive thing to do; I felt really peaceful in the knowledge that my gift will help others.

Leaving a gift in your Will isn't only for the affluent, it's for everyone.

I want my work and life to mean something, and this is one small step towards that goal.

My gift is for Dad – and for all the other mums and dads who might find themselves in the same situation. I hope my gift means no other child loses their parent to this disease."



Dad's greatest gift for me

"My dad always said: you don't take it with you. He was absolutely right. His greatest gift was his generosity. And I want to make sure his values live on."

Charlie





ICR The Institute of Cancer Research

The Institute of Cancer Research (ICR), London, is one of the world's most influential cancer research institutes. We are a higher education institution and a charity, and we work to deliver world-class research and treatment.

Our mission is to make the discoveries that defeat cancer. In the past year, our legacy marketing and fundraising has seen significant growth, with impactful campaigns, innovative supporter engagement, and a strong focus on stewardship.

This financial year, we are close to hitting £1 million in legacy pledges. Please take a look at the summary of our legacy activity on the next slide.

Dnyaneshwari Haware

Legacy Marketing & Stewardship Officer

Legacy Loop



1. Legacy Messages

At ICR, our legacy messaging is rooted in gratitude, clarity, and impact. We aim to show supporters how their gift in a Will can help defeat cancer for future generations. Our approach Includes:

- **Multi-channel marketing:** We use direct mail, digital campaigns, organic and paid social media, and door drops to reach diverse audiences. We have also recently expanded our email marketing to include our warm supporters.
- **Tailored messaging:** We segment communications to speak directly to pledgers, intenders and prospects, using supporter stories and researcher voices to bring our message to life.
- **Always-on presence:** We maintain a consistent digital presence through our website, online Will provider microsite, and evergreen content.

2. Engagement Ideas

We've introduced several initiatives to deepen engagement with legacy supporters:

- **Supporter Tea Event:** A refreshed stewardship event featuring legacy pledgers, researchers, and patient stories. It included a Q&A and was praised for its warmth and impact.
- **Legacy Video:** A heartfelt video featuring pledgers and researchers, used across campaigns and social media.
- **Personalised stewardship:** Handwritten thank-you notes, tailored follow-ups, and a growing focus on collecting and sharing pledger stories.
- **Legacy Stewardship Research Programme:** We're part of a consortium exploring best practices in legacy stewardship and presented our work as a case study.

3. Success Stories

This past year, we've tried a few new things while continuing some of our successful practices.

- **Legacy Campaigns:** Our Spring campaign saw strong engagement, supported by the new legacy video and refreshed materials.
- **Online Will Provider Launch:** We successfully launched our partnership with Make A Will Online, with 45 Wills made and 29 pledges in the first 9 months.
- **Door Drop Innovation:** We tested new regions with targeted materials promoting our online and NFWN offers, resulting in a spike in enquiries and pledges.
- **Pledge Growth:** Across all channels, we saw a significant increase in pledged income year-on-year, with over £1 million pledged in FY24–25.

Show & Tell – Engagement Ideas

St Wilfrid's Hospice (Eastbourne): From Seminars to Socials: A Multi-Channel Approach

Promoting their solicitor-partnered Make a Will scheme for September via radio, press, social media, and leaflets.

Earlier in the year we hosted **Legacy Seminars** where a solicitor gave a presentation on wills and powers of attorney; another Hospice UK campaign to follow in September too.

Despite strong promotion, fewer than 5 wills have been completed – possibly due to an older supporter base (60+).

Legacy messaging also included in supporter mailings and staff/volunteer newsletters throughout the year.

Legacy income has dropped, with delays in estate admin and asset sales creating added financial pressure.

Takeaway Tip:

Reflects a common challenge, even warm, older audiences may need more time, reassurance, and tailored prompts before acting.

Elizabeth Veale, Legacy Administration Officer, St Wilfrid's Hospice (Eastbourne)



St Wilfrid's Hospice

Show & Tell - Success Stories

Ashdown Forest Foundation: Laying the Legacy Groundwork

As a newer charity with limited capacity, Ashdown Forest Foundation are building their legacy programme step by step.

Partnered with MAWO for 9 months – already secured a pledge from a trustee via the platform.

Soft internal launch has helped engage trustees and build internal confidence.

Public-facing activity includes a new legacies webpage, regular e-newsletter mentions and plans for a leaflet campaign.

A legacy training session for the Forest's Conservators is in development.

Takeaway Tip:

“Small steps lead to big impact – even with limited time, steady progress builds lasting legacy momentum.”

Katie Jones, Fundraising Manager, Ashdown Forest Foundation



Spotlight on: Legacy Giving



Imagine a future where the beauty of our natural landscape remains undisturbed and unthreatened, where generations to come can continue to find solace and inspiration in nature. This is the legacy that The Ashdown Forest Foundation aims to achieve.

You can be a part of that legacy too, by leaving a gift in your will.

A legacy gift is more than just a donation, it is a way to leave a lasting impact on our world. Whether your gift is large or small, it will make a meaningful difference to Ashdown Forest, its nature and its people.

Did you know that you don't need to be wealthy to leave a legacy gift? Even a small donation can make the world of difference.

Please help us to keep Ashdown Forest a place of beauty and wonder, and secure its legacy for the future. If you would like to consider leaving a gift in your Will, you can find out more by clicking on the links below.

[Make A Will Online](#)

[Find a Solicitor](#)

[Find out more on our website](#)

[Contact us about a gift](#)

More ways to support us:



Your Turn – Let's keep the Loop going!

Feel free to share any wins, small steps or even questions – it all helps us learn together

- Have you run any recent legacy campaigns or events? What worked well (or didn't)?
- Have you tried any new messaging approaches or creative materials?
- What channels have you used to promote legacy giving - digital, print, in-person?
- How have you involved colleagues, trustee or volunteers in your legacy work?
- Have you received any pledges or unexpected legacy conversations recently?
- Are you planning anything new for the months ahead (leaflets, comms, training etc.)?
- What's one challenge you're currently facing in your legacy activity?
- Is there something you've learned recently that might help others here?
- How are you using your MAWO partnership – anything you'd like to try next?



The ***Fill Your Will With Hope*** campaign, supported by revamped materials, enhanced internal engagement and tailored training sessions. The campaign's multi-channel approach, featuring direct mail, telemarketing and digital outreach ensured wide reach and consistent messaging.



The campaign featured an inspirational case study, Scott, who lost his wife, whilst pregnant to a brain tumour. Scott went on to support the charity in several ways, one of these is as a legacy pledger. Scott's story really embodied the campaign, demonstrating that through loss he knew that '*filling his will with hope*' was a long-term solution to the devastating problem.




Zoe bought along some materials to share with the group, bookmarks and leaflets which were very well received and discussed.

Gifts in Wills

Brain tumours remain the biggest cancer killer of children and adults under 40, and claim the lives of over 5,000 people every year. Gifts in Wills could fund research that leads to a life-saving breakthrough, or help develop a kinder treatment.


Hope comes in all shapes and sizes – no matter what size gift you choose to leave, you will be giving hope to everyone who faces a brain tumour.



Find out more

See how you can leave a gift in your Will, and the amazing impact it will have.


[Find out more](#)



Write your Will for free

We work with amazing partners so that you can write a Will easily for no additional cost.

[Write a free Will](#)



How to write a Will

Do you need help writing a Will? It's easier than you think. Follow our simple steps to guide you.

[Find out more](#)

Zoe Maynard
Individual Giving Manager

Royal Geographical Society

with IBG

Advancing geography
and geographical learning

Christine Quigley
Development and Fundraising Manager

Being a very new partner and with their last legacy campaign being in 2008, Chrissie wanted to soak up inspiration to take back to the office to kickstart their gifts in wills planning. They are lucky to receive legacy pledges and thinks that a legacy event to showcase some of their donations would be very well received.

[Home](#) > [...](#) > [Support us](#) > [Leave a gift i...](#)

Leave a gift in your will

When the time is right to remember a charity in your will, remember the Society.

You can gift an item, money or a share, percentage, or fraction of an estate. Every gift in every will, however large or small, makes a difference.



Make sure what you care about most is looked after how you'd want, by writing your Will. Whether that's your loved ones or a cause you believe in.

Combat Stress offers free Will writing services to all our supporters, any time, to give you and your loved ones peace of mind without any financial concern.

There's no obligation to leave a gift, but if you do, you'll be helping veterans for generations to come.



FORM ON FACEB...
**Your Will can
help veterans f...**

[Learn more](#)

COMBAT STRESS

FOR VETERANS' MENTAL HEALTH

Maddy spoke about their current social media ad which has a military focus which links through to a form to capture enquirer data. They are also planning to directly link from this ad through to their Make a Will Online landing page. The plan is to have this running throughout the year as a way to have a steady flow of contactable enquirers.

Maddy Dempster
Planned Giving Officer

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Bromley & Croydon

**women's
aid**



**Safe
accommodation**



**Support
& advocacy**



**Training &
Awareness**



info@bcwa.org.uk



020 8313 9303



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Legacy Loop

Bromley & Croydon

**women's
aid**

Completely new to Legacy Fundraising as an organisation, Hannah needed guidance on how to reassure their senior management and Trustees that Gifts in Wills messaging could be integrated into their fundraising communications. An Internal Engagement session was discussed as a great way to achieve buy-in.

Hannah Calascione
Senior Fundraising Officer



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Leave a gift in your will

Ensure your values live on by leaving a legacy gift in your will.

A gift in your will can safeguard our charity's future for generations to come. Your support helps us build a world where every autistic person accesses an education which empowers a life full of choice, independence and opportunity. What's more, you can create your will today in just a matter of minutes for free!



Make a will online (for FREE!)

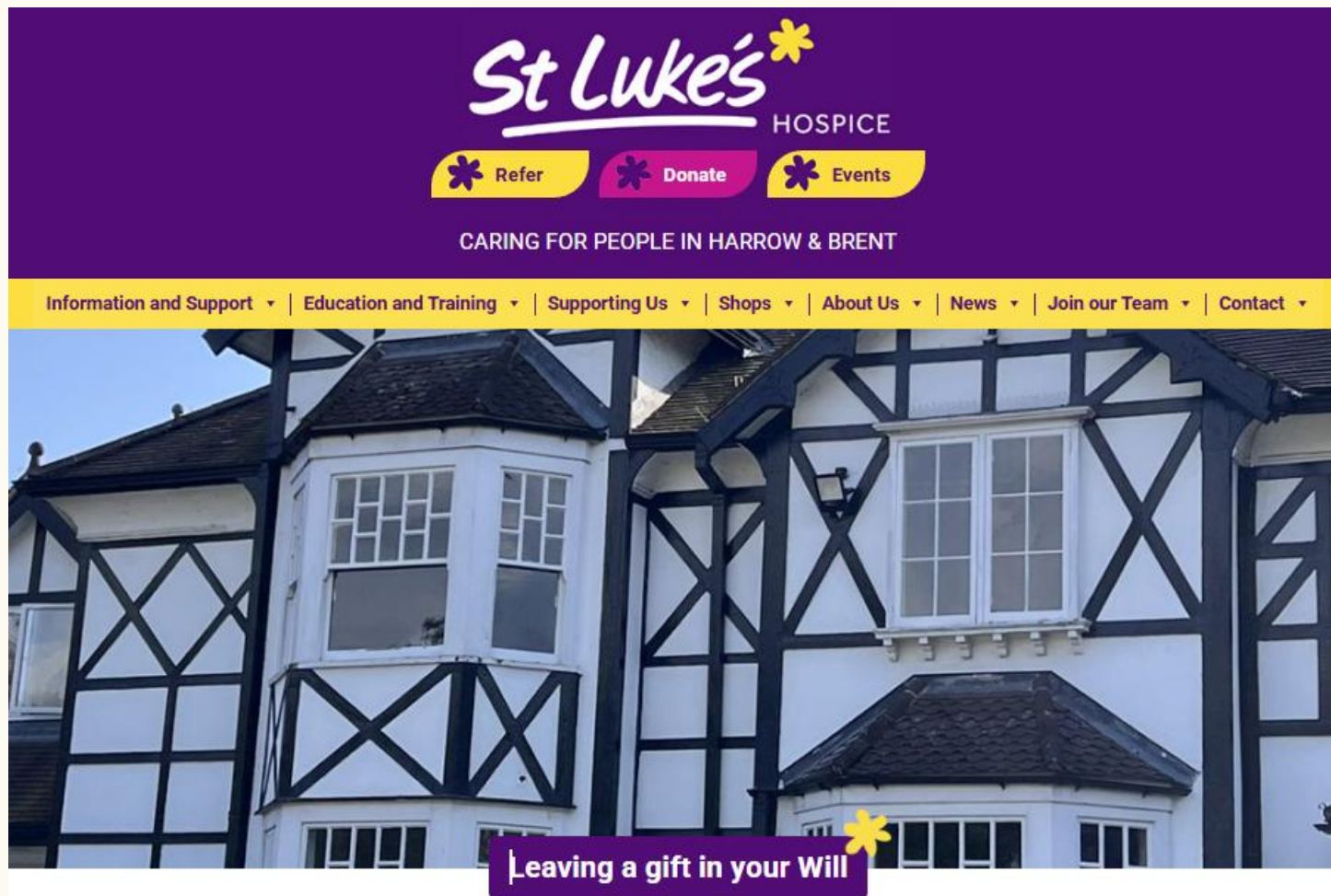
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Being a new partner this year and Phaedra being new to the organisation too. Phaedra wanted to soak up inspiration to take back to the office to help form their gifts in wills campaign. To her knowledge the charity hadn't received any pledges to date. As they have been established for around 25 years, Oliver suggested that there could be some organic gifts out there waiting to be uncovered. A simple checkbox exercise on supporter comms could help discover pledges.

Phaedra Charlton

Head of Marketing and Communications





Jess Ellison

Legacy and In-Memory Fundraiser

Legacy Loop



Jess is new to Legacy Fundraising and wanted to soak up some inspiration and ideas to take back to the office to help plan their future gifts in wills campaigns.

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Inspiring Leadership to Invest Into Legacies

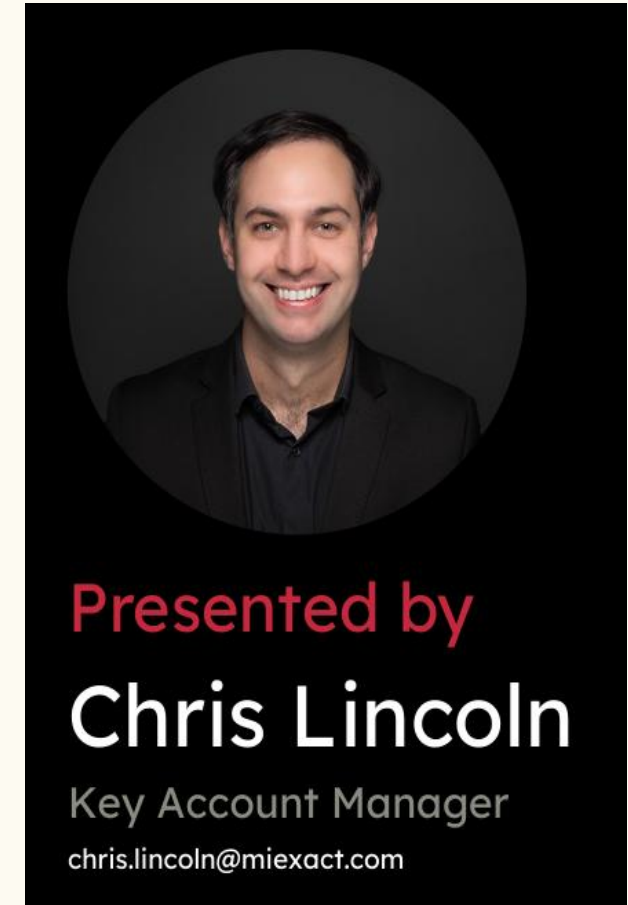
Chris Lincoln – Smee and Ford

With insights from: Emily Ding, Gifts in Wills Manager, Canal & River Trust

Chris delivered a thought-provoking mini-session on the importance of **leadership buy-in** when growing a successful legacy programme. His talk centred around three key themes:

- ◆ **Learning from Peers** – Sharing real-world examples and experiences from across the sector helps shift perspectives and build confidence.
- ◆ **Departmental Buy-in** – Gaining support beyond fundraising teams is vital to embedding legacies throughout an organisation.
- ◆ **Informational Influence** – Presenting data, success stories and supporter feedback in the right way can encourage leadership to support and invest in legacy giving.

To bring these ideas to life, Chris shared a powerful case study from **Emily Ding** at the **Canal & River Trust**. When Emily joined the organisation, she encountered hesitancy around legacy activity, particularly from leadership. However, by starting small and framing early initiatives as **pilots**, she was able to gather tangible results and supporter feedback.



Inspiring Leadership to Invest Into Legacies

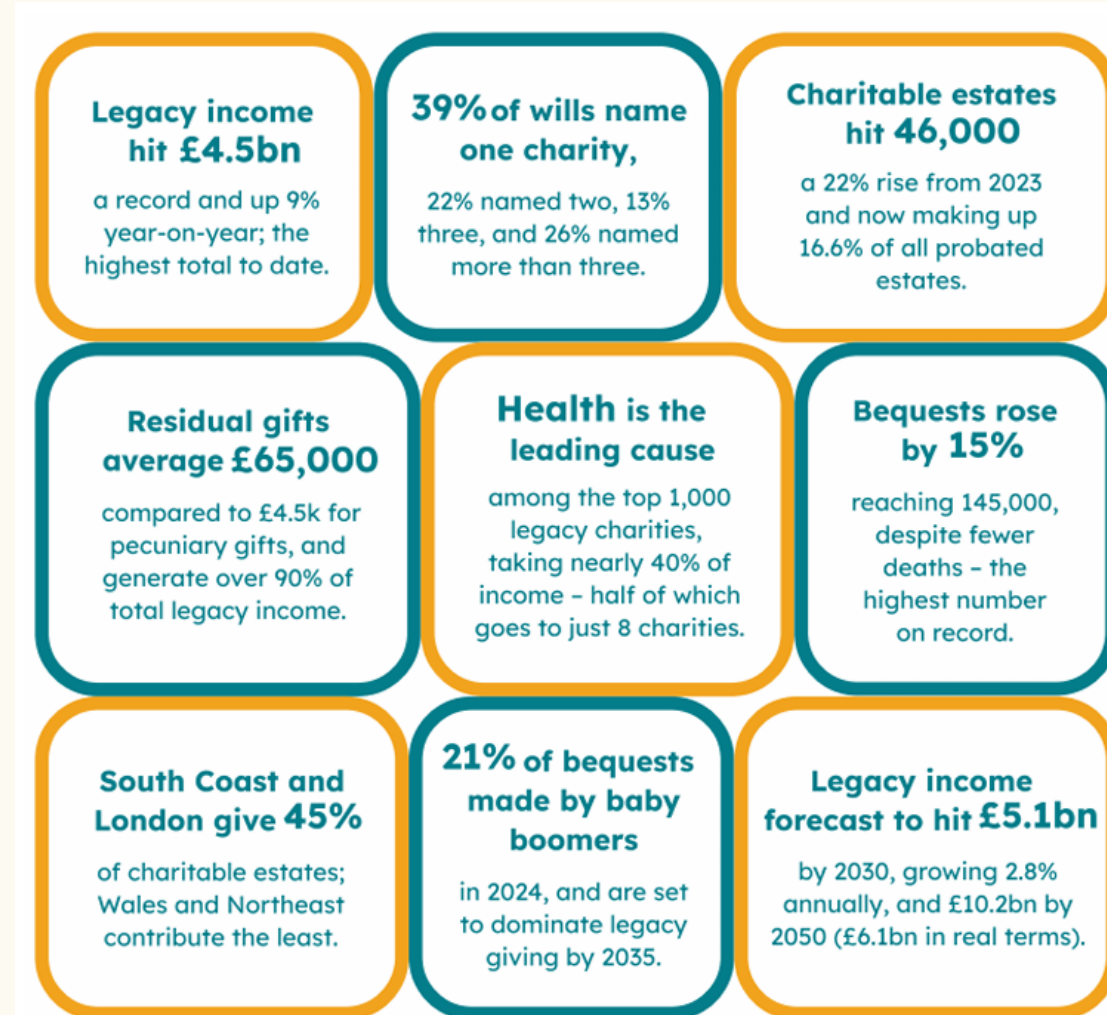
Chris Lincoln – Smee and Ford

Key learnings from the case study included:

- Running two successful pilot legacy events in 2022 helped build leadership confidence.
- Successes were shared widely, leading to increased senior leadership involvement the following year.
- Stories of real gifts – and the staff/supporter connections behind them – were regularly shared to bring legacy giving to life across the organisation.
- Known pledgers were meaningfully involved in stewardship, including collaboration with senior leaders.

Emily's message was clear: **expect some hesitation**, but don't let it derail your plans. Celebrate your wins, involve your leadership where possible, and acknowledge their role in your programme's success.

Chris concluded the session by reminding us of the scale and opportunity of legacy fundraising, highlighting that **£4.5 billion was pledged in gifts in wills last year** – a powerful reminder of the impact we can all play a part in.



Any Questions?



Thank you for sharing

We hope you found this session inspiring

Now for another networking break before we head off to the pub

Next Legacy Loop will be in September

Q&A with the Fundraising Regulator (hopefully!)



Legacy Loop

September