

# Legacy Loop

# Driving action in gifts in wills

# | Did you know?

Gollwitzer and Sheeran 2016; Steel 2007

Intentions only  
account for

**28%**

of variance in  
behaviour

A meta-analysis  
showed that

**47%**

of people intend to  
act but don't

A meta-analysis  
showed that

**15-20%**

of us are chronic  
procrastinators

# I Making our minds up is just the start!

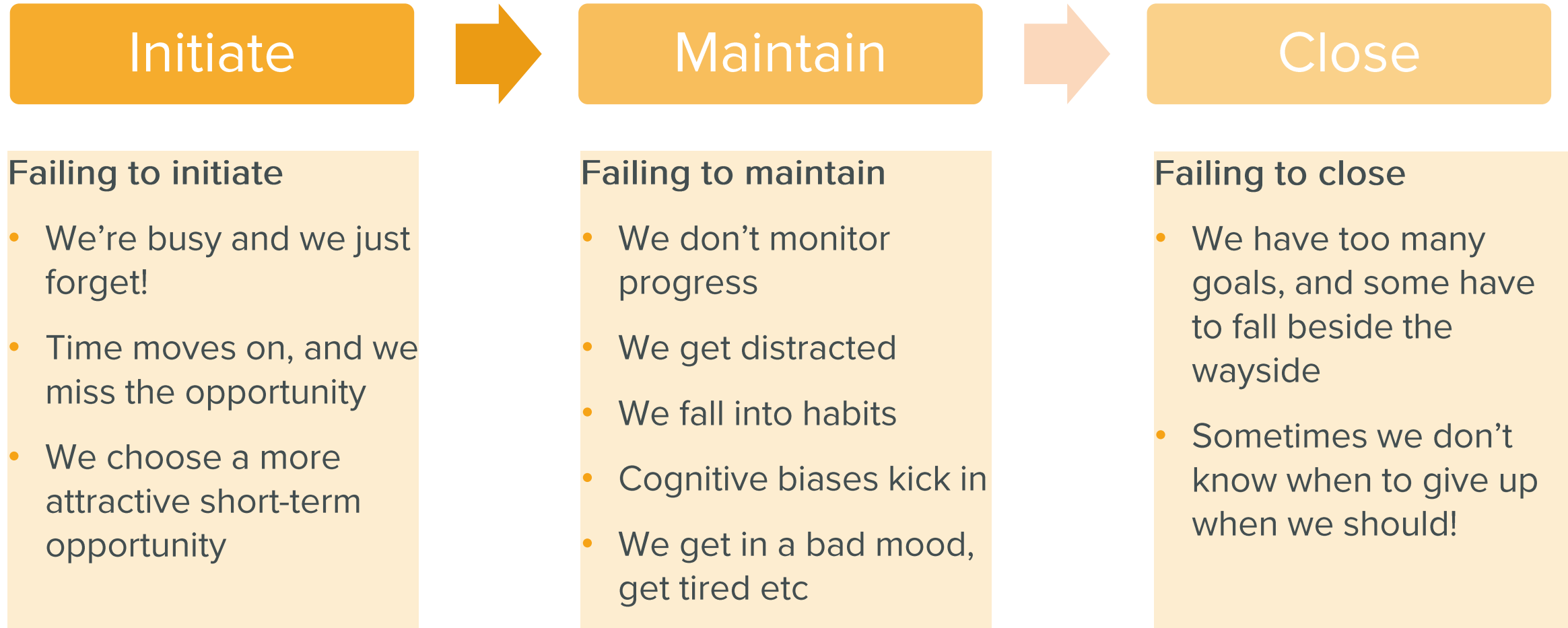
We then have to act



Sheeran and Webb 2016

# Challenges with completing our goals

Gollwitzer and Sheeran 2016; Sheeran and Webb 2016



# I And it's easy to procrastinate in our space

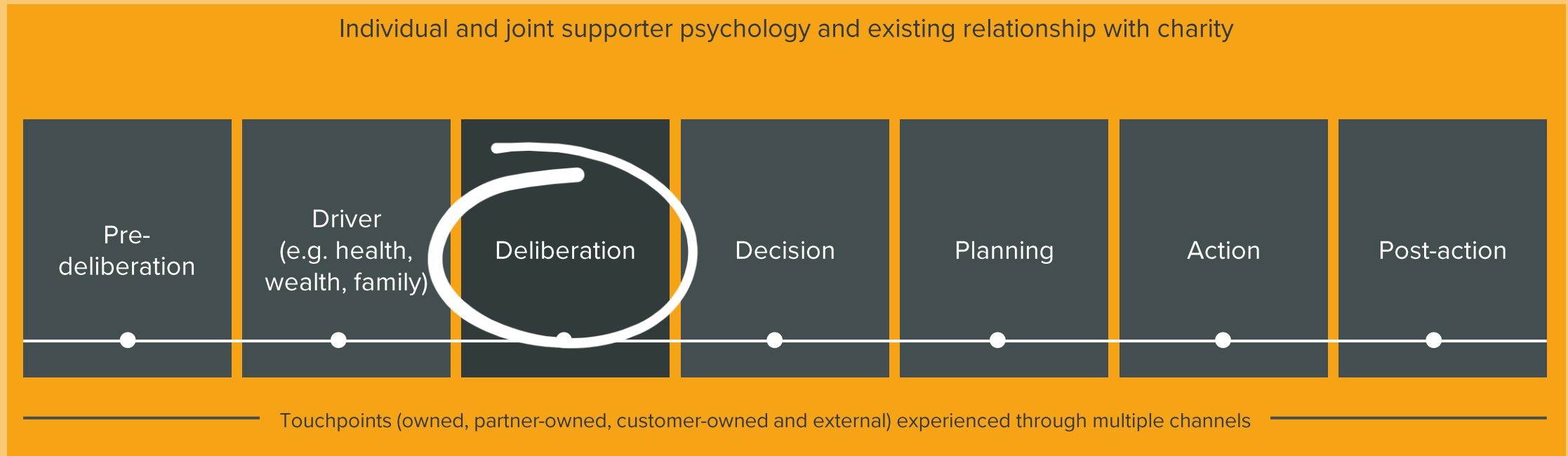
Steel 2007

- Some of us are natural procrastinators – there's enough evidence to see it as a trait
- The further away an event is, the less impact it has on our decisions
- The more aversive we find a task, the more likely we are to want to delay it
- We give tasks to our 'tomorrow selves' who we think will feel better, have more energy, be better etc – but in fact, we're being unkind to our future selves
- We can get into a procrastination > low mood loop

Macro-factors e.g. crises, economic situation, causal relevance

Micro-Factors e.g. other charity activity, peer feedback

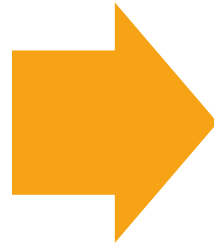
Individual and joint supporter psychology and existing relationship with charity



# I Deliberation

Can be sub-divided into information search and evaluation

**Information  
search**



**Evaluation**



# | Deliberation

The evaluation phase



Own ability to deliver  
Self-efficacy  
Broader situation

Consequences  
Desirability of incentives  
Delivery of fundamental needs  
Positively framed goals

# I Demonstrating the donor's past performance

## Hearts Together

### **Every gift, however large or small, makes a difference to peoples lives**

The donations, gifts and legacies we receive, enable us to make a difference to people's lives 365 days a year. By leaving a legacy gift to Hearts Together, you allow us to make a positive impact on people's lives through everything that we do! You are ensuring that families can be close to their loved ones when they are receiving treatment or end of life care, you are providing a safe and comfortable space for patients receiving cancer treatments, you are offering anxious individuals support the night before they undergo life changing surgery, you are giving relatives and carers the encouraging words they need to hear - that they will be ok and they can get through this, you are providing a bed for the night for a family who cannot afford to pay, you are making a positive difference every day.

It is important that we make plans for what we would like to happen when we are gone to ensure that our legacies live on as we intend them to, which is why writing a will is so important. Providing for our loved ones is top priority but if we have made a difference to you or your loved ones and if you are able, please remember us in your will too.

**Click [HERE](#) to request your free guide to leaving a gift in your will**

Verbal persuasion

Remember a Charity

# How to leave money **to charity** in your Will

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



# Seeing others perform

Marie Curie

 **Marie Curie UK**  
Sponsored  
Library ID: 1165248791319412

New marriage in the family, new baby or just a new day. Whatever your life stage, it's crucial to think about your Will too.



**What will start your  
#WillTalk?**

[HTTPS://WWW.MARIECURIE.ORG.UK/DONATE/GIFT-IN-](https://www.mariecurie.org.uk/donate/gift-in)

 **Marie Curie UK**  
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Library ID: 746245294007929

New marriage in the family, new baby or just a new day. Whatever your life stage, it's crucial to think about your Will too.



**Plan together  
#WillTalk  
together**

[HTTPS://WWW.MARIECURIE.ORG.UK/DONATE/GIFT-IN-](https://www.mariecurie.org.uk/donate/gift-in)

# | Meeting fundamental needs

Will Power



## Writing Your Will May Be the Kindest Thing You Do for Your Loved Ones

Are you one of the 49% of Canadians that don't have a Will? Or maybe you do have a Will but there have been changes...



Relatedness



## Having the Conversation: A Proactive Approach Ensures You Get What You Want

Many of us put off estate planning, including writing a Will, thinking that it can wait. After all, who wants to contemplate their mortality? However,...



Autonomy



## Making a Gift That Will Last the Test of Time

Catherine Rowe has always been involved in charity. She considers it essential to become engaged personally in charitable organizations. "Giving financial support and getting involved as...

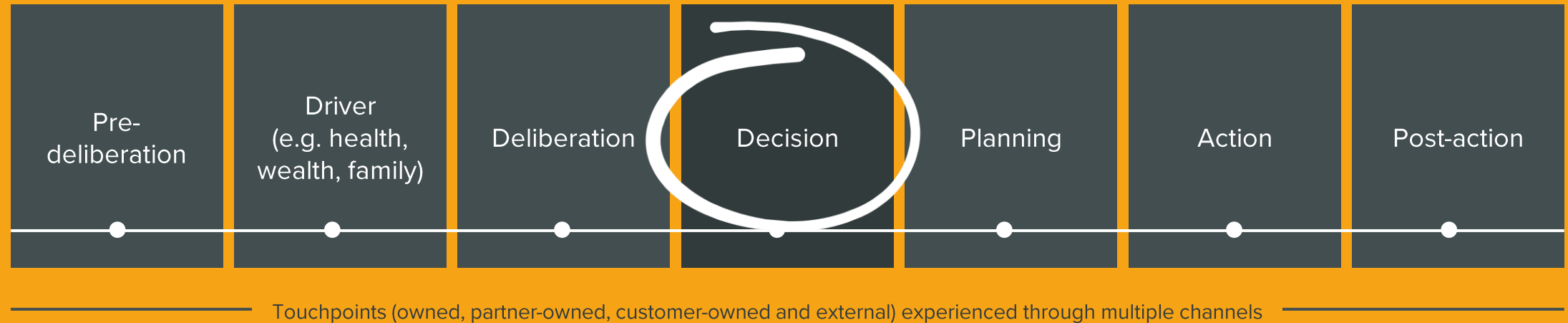


Competence

Macro-factors e.g. crises, economic situation, causal relevance

Micro-Factors e.g. other charity activity, peer feedback

Individual and joint supporter psychology and existing relationship with charity



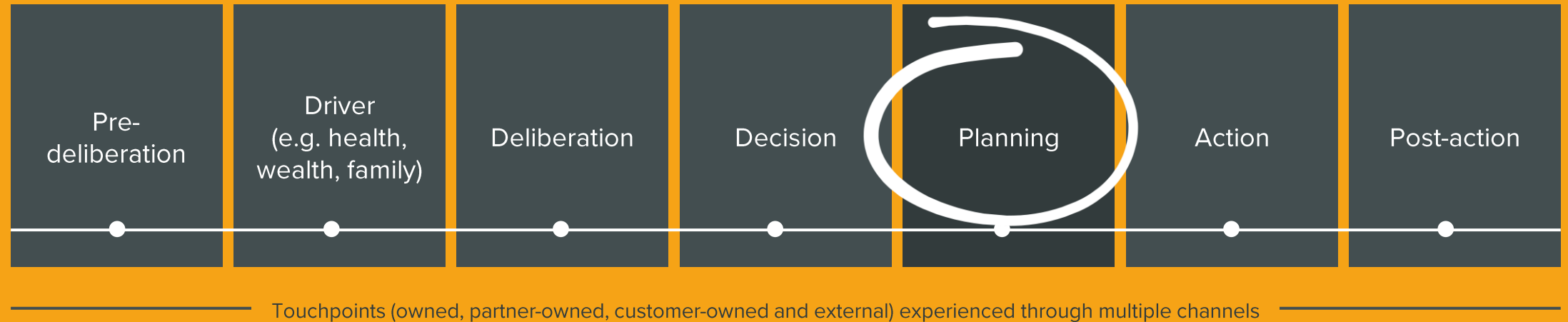
# I Decision



Macro-factors e.g. crises, economic situation, causal relevance

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Individual and joint supporter psychology and existing relationship with charity





# | Planning

How do people plan to achieve a goal?



# I Powerful interventions in the planning phase

- **Implementation intentions:** more powerful than goal intentions (e.g. an implementation intention for winning a race might be 'I will speed up on straight sections of the track' whereas 'I will win the race' would be a goal intention)
- **Mental contrasting:** what are the obstacles I might encounter, and what will I do if they occur? (If-then plans) These are powerful as they reduce the need for conscious processing
- **Information that helps me achieve my goal:** I will avoid information that might be distracting

# Helping people to plan Will Power

## Calculate your Legacy

You can make a difference with a gift in your Will to charity, while still taking care of those you love. Use our calculator to see your potential impact.

### 1. Let's estimate the value of your estate

#### My assets

Estimated value of all property you own including vehicles  
\$50,000

Estimated value of all retirement funds, investments and other savings  
\$50,000

**Total: \$100,000**

#### My liabilities

Estimated value of your mortgage, car loans and any other debt  
\$2,000

### 2. Your potential gift

**\$48,020**

Charity gift  
40% of your estate

**\$49,980**

Gift to loved ones  
50% of your estate

[Terms](#)

## What's Next?



### Find financial advisors to help plan a gift in your Will

Speak with an advisor about different ways to maximize your giving.

[SEE ADVISORS](#)

If you're feeling stuck. Make a plan to move forward:

If I'm having a hard time starting my Will, I will...

Examples: ...break down tasks into bite sized chunks.  
...set a reminder to complete one task at a time.  
...find motivation in [reading about others](#) who have gone through the process.

Feel stuck? Make a plan:

If I'm having a hard time choosing a guardian for my dependants, I will...

Examples: ...speak to friends to see what they've done.  
...make a list of candidates and weigh the pros & cons.  
...spend some quality time with potential candidates in their home.

Feel stuck? Make a plan:

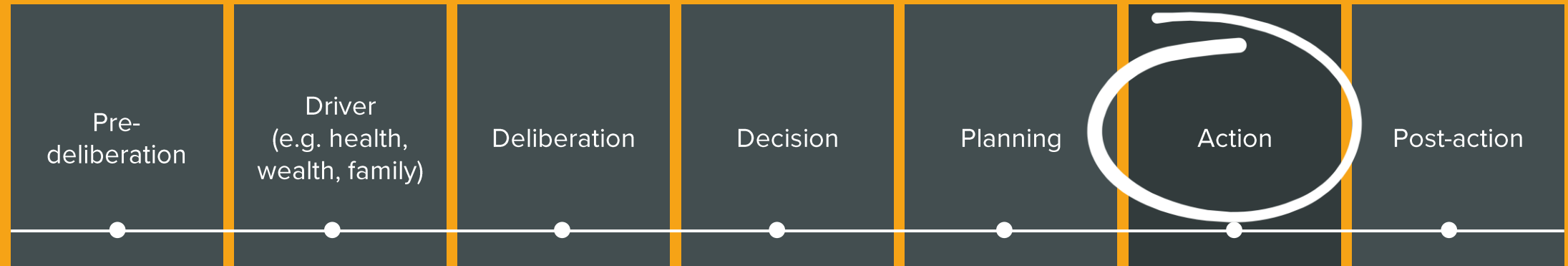
If I'm having a hard time choosing a charity I will...

Examples: ...look to the charities I'm already involved with.  
...think about the charities that have helped me/my family in the past.  
...make the best decision for now, knowing I can revise my Will in the future.

Macro-factors e.g. crises, economic situation, causal relevance

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Individual and joint supporter psychology and existing relationship with charity



Touchpoints (owned, partner-owned, customer-owned and external) experienced through multiple channels



# Monitoring progress

Sheeran and Webb 2016





## Breakout groups

In your groups, think about one key takeaway that you could implement in your organisation...and when, where and how you'll implement it.



## Thank you

Please stay in touch!

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