

Legacy Loop



March Legacy Loop

Turning Data into Action
24th March 2026

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Make a Will Online

2025 Data



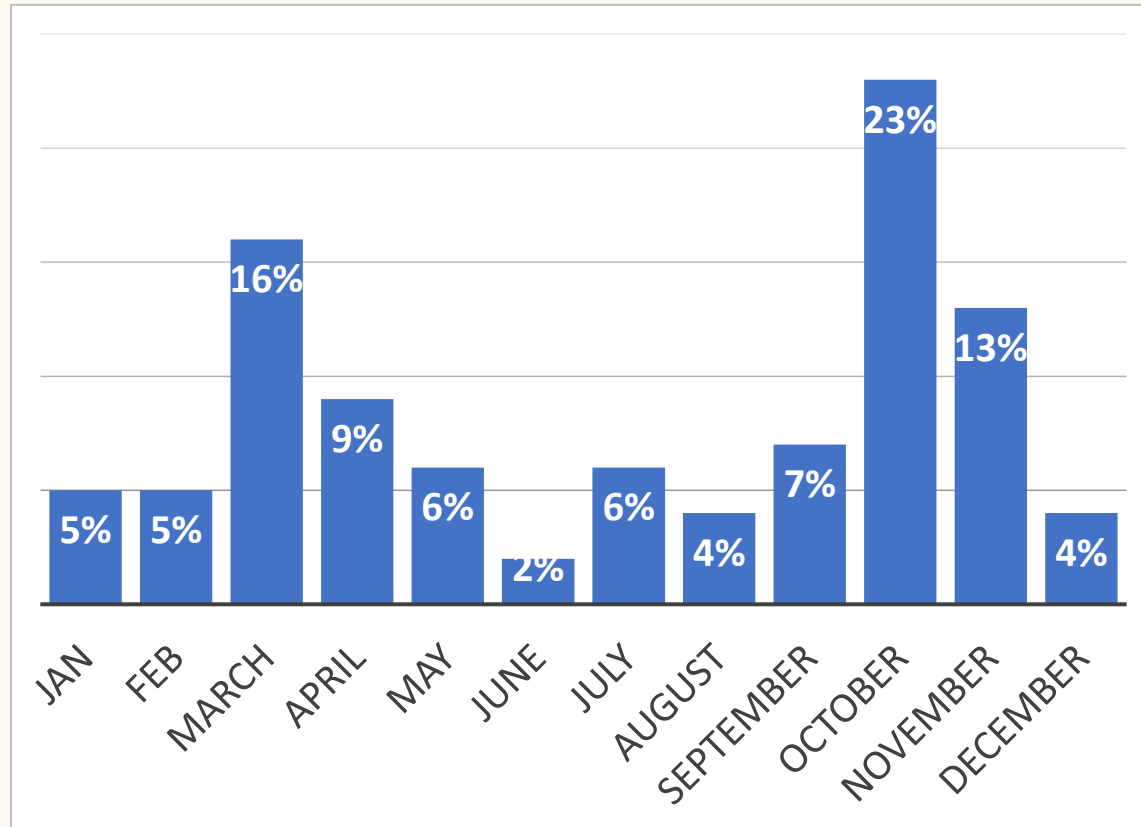
Turning Data into Action: Insights from 2025 Will-Writing Behaviour

- Understanding supporter behaviour when writing a will
- What the data tells us about completion and engagement
- Legacy gift behaviour and supporter age trends
- Benchmarking across charities



Understanding Supporter Behaviour When Writing a Will

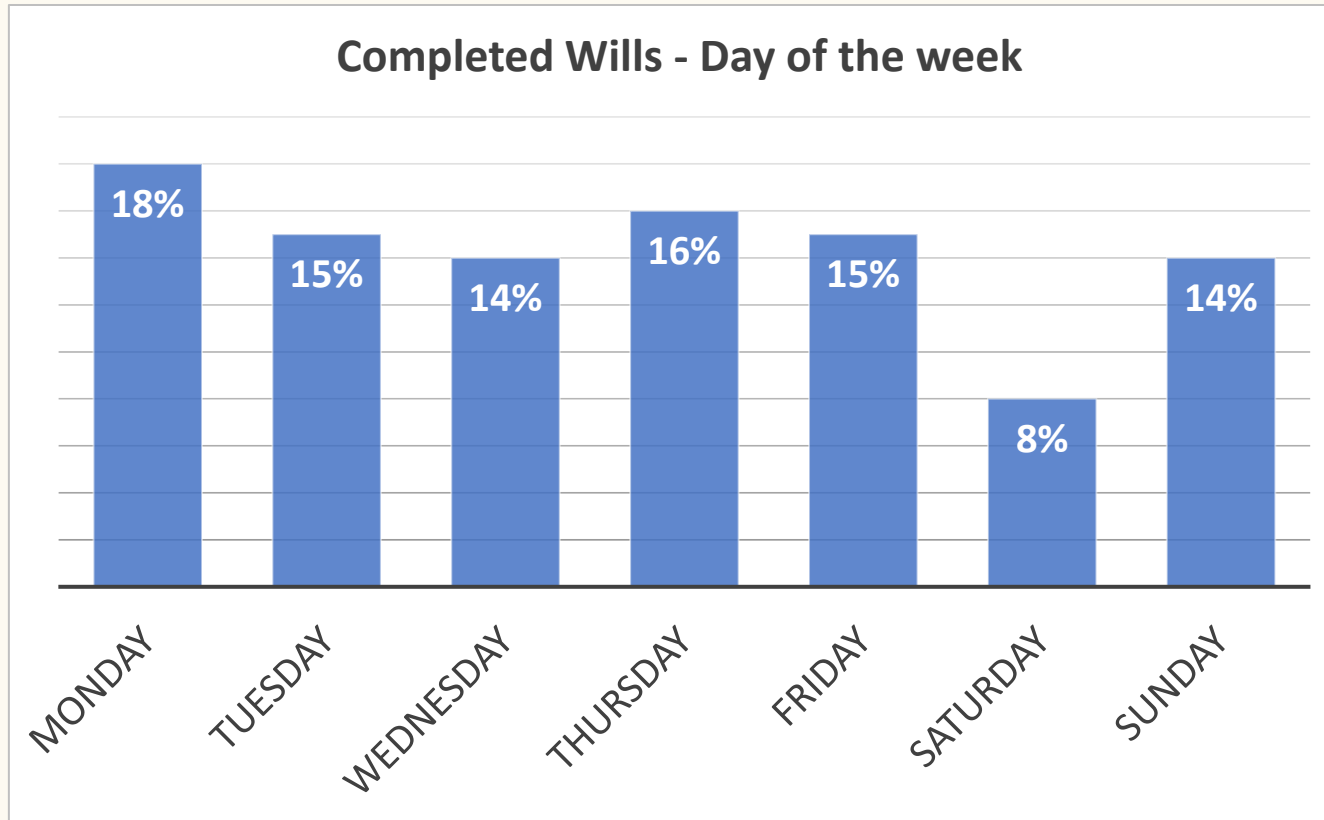
When Do People Write Their Wills?



Charity Supporters' will writing activity spikes during

March & October

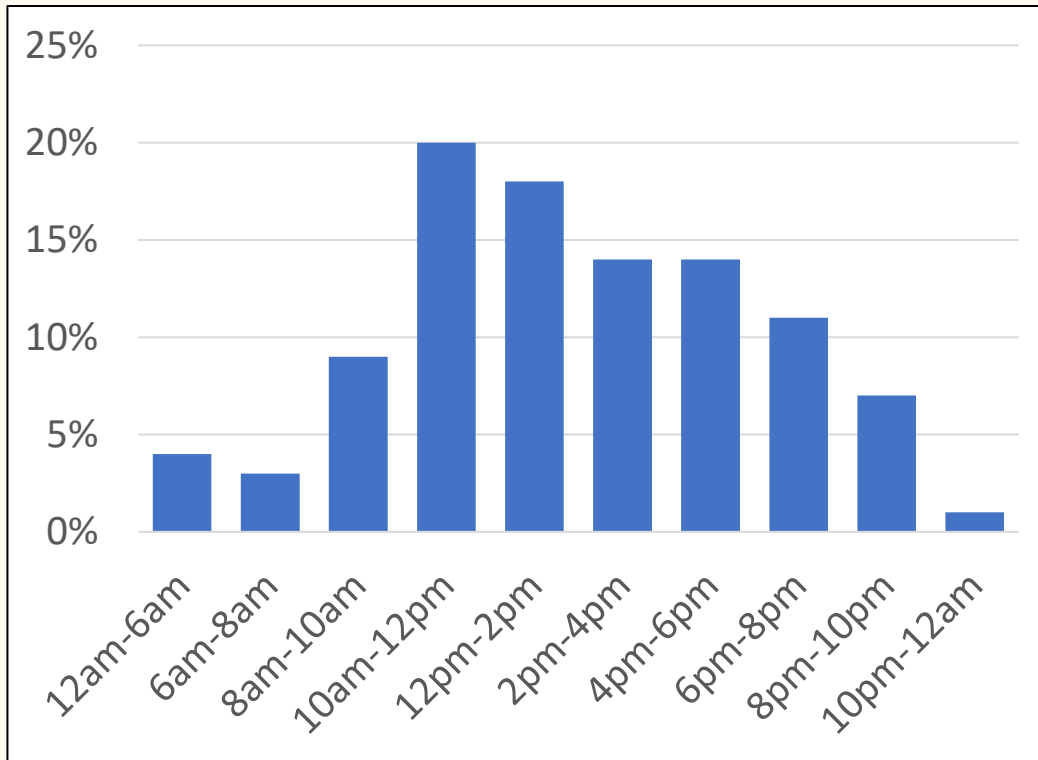
Day by Day



Will completions are highest during weekdays

Supporters engage during their normal weekly routines

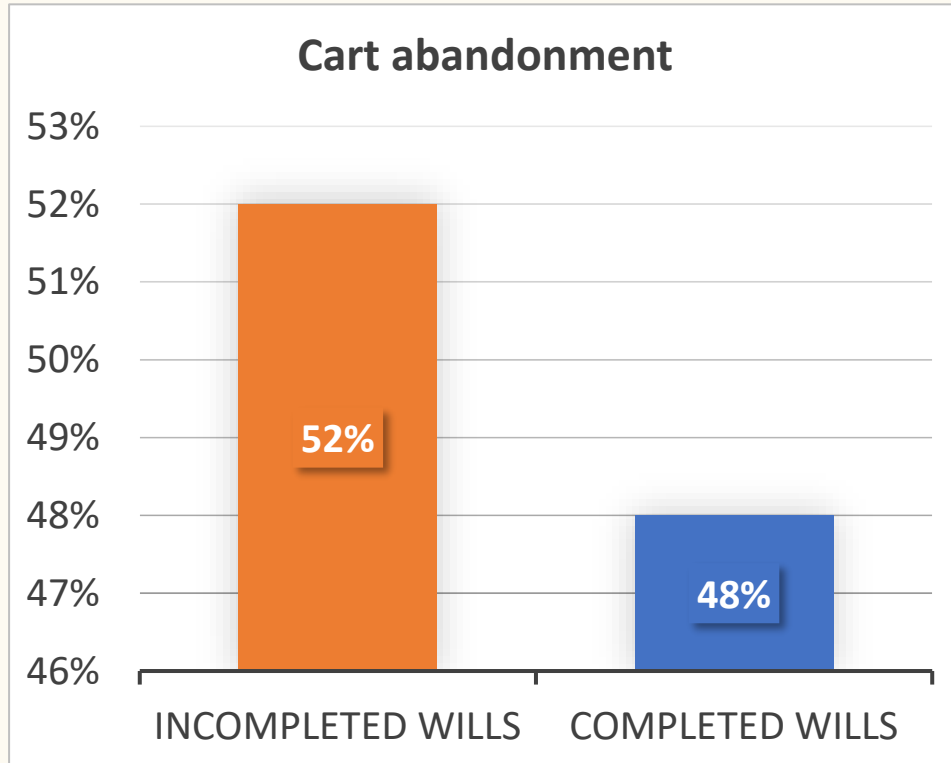
Peaks during the day



Most wills are completed between 8am and 6pm

Supporters are engaging with will writing during daytime hours during their normal routines.

Completion and engagement



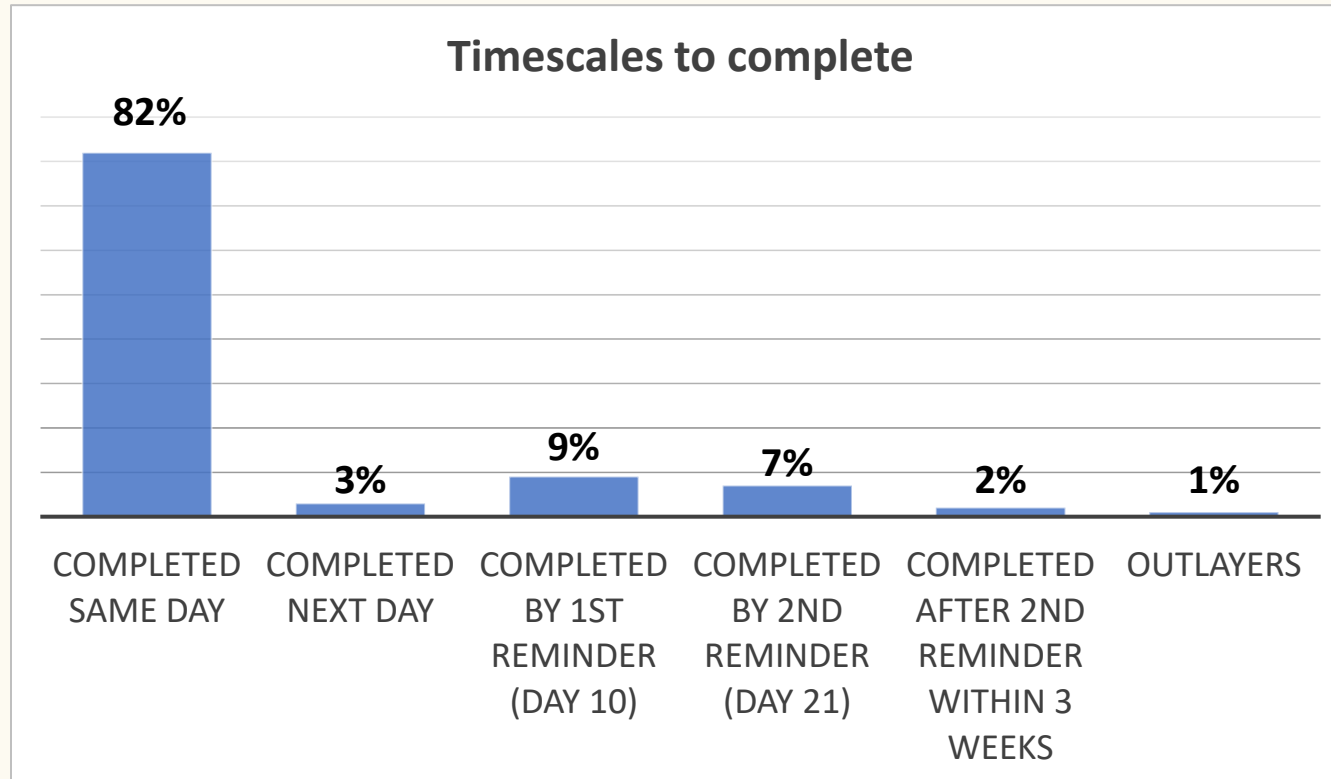
Just over half wills have been started but not finished.

Abandoned? Completed off-platform?

A clear opportunity to strengthen supporter follow-up and conversion:

- (1) Increase pledges by increasing completion; and
- (2) capture off-platform conversions

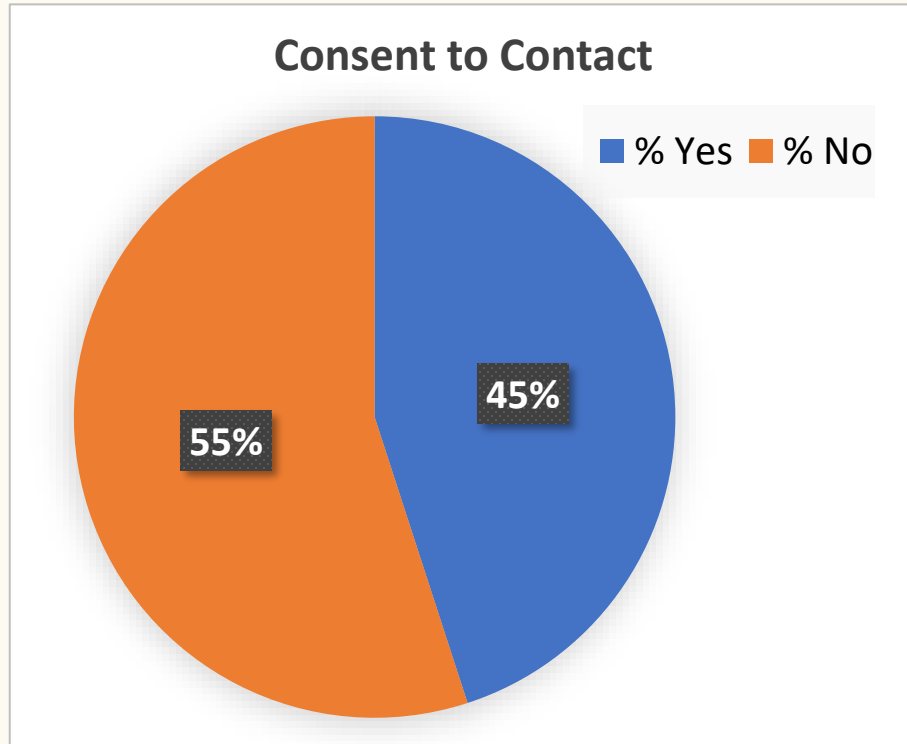
Will completion



A large proportion of supporters complete their will in a single session

Additional conversions driven by reminder prompts.

Opt-Ins for GDPR



Nearly half of supporters are open to being contacted, creating a strong foundation for meaningful stewardship.

Legacy giving is influenced by everyday behaviour

Will writing happens during normal weekly routines, with most completions taking place during weekdays and daytime hours.

Why this matters

Decisions are often made day-to-day rather than special occasions. Gifts in wills are left “in the shopping cart” but what does this mean?

Implication for charities

Could this insight have an effect on your gifts in wills comms?

Does this reflect what you see with your own supporters when it comes to engagement with legacy content?

BREAKOUT

What effect (if any) will this have on your comms?

3 mins

Legacy Opportunities

A significant proportion (29%) of wills left in the shopping basket contain a charitable gift, and 45% of supporters opt in to be contacted, creating valuable opportunities for follow-up and stewardship.

Why this matters

These supporters have already shown strong intent - but without follow-up, both **potential gifts and meaningful relationships risk being lost.**

Implications for charities

Incomplete wills are not lost - they represent warm, high-intent prospects

Stewardship and timely follow-up can help convert intent into confirmed gifts

Opt-in supporters provide a clear opportunity to build relationships through personalised thank you's and ongoing engagement

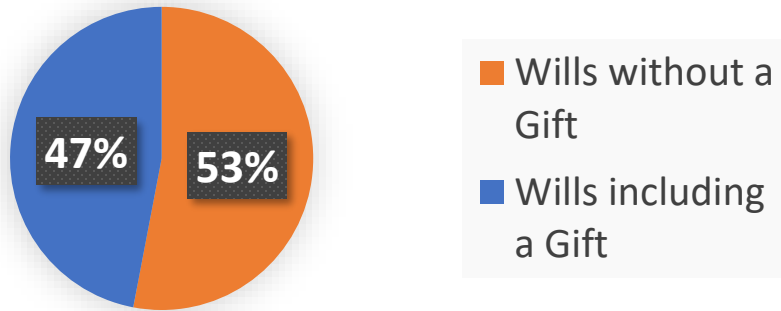
How are you using both incomplete will data and consented contact to turn intent into long-term legacy relationships?



What Gifts Supporters are Pledging

Engagement

Gift Inclusion

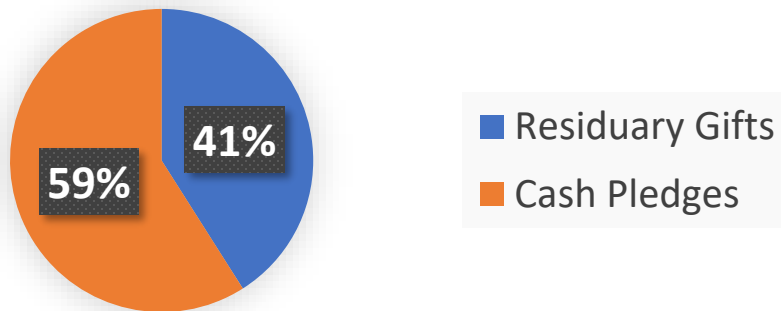


47% of wills include a gift

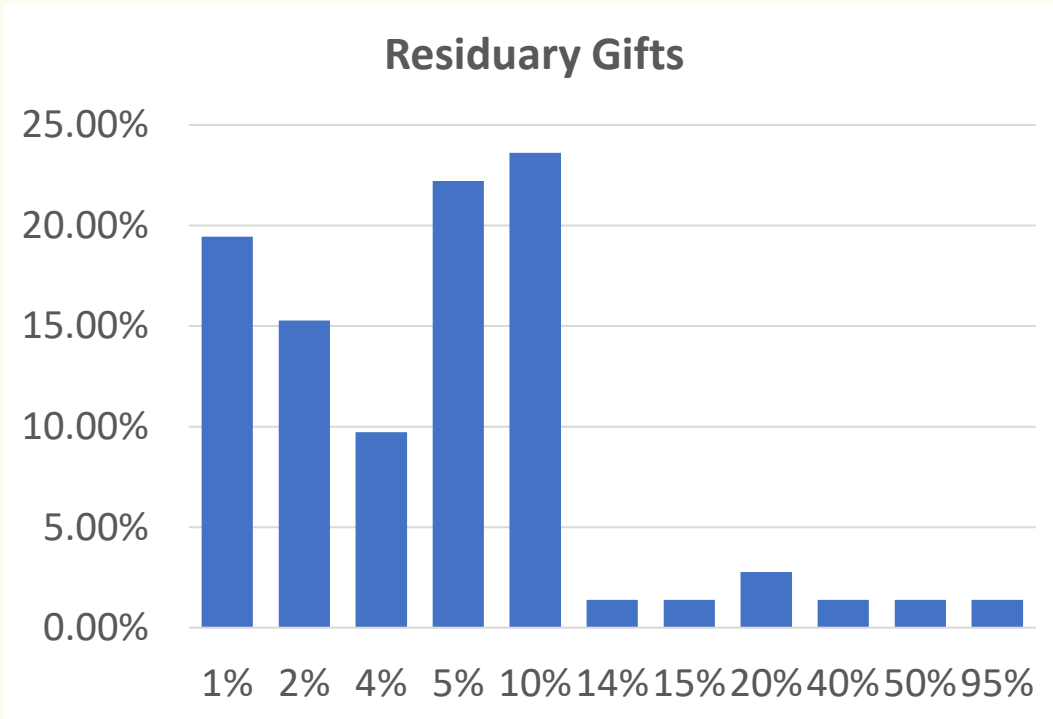
41% of gifts are residuary.

Opportunity to shift behaviour towards residuary gifts?

Residuary/Pecuniary Split



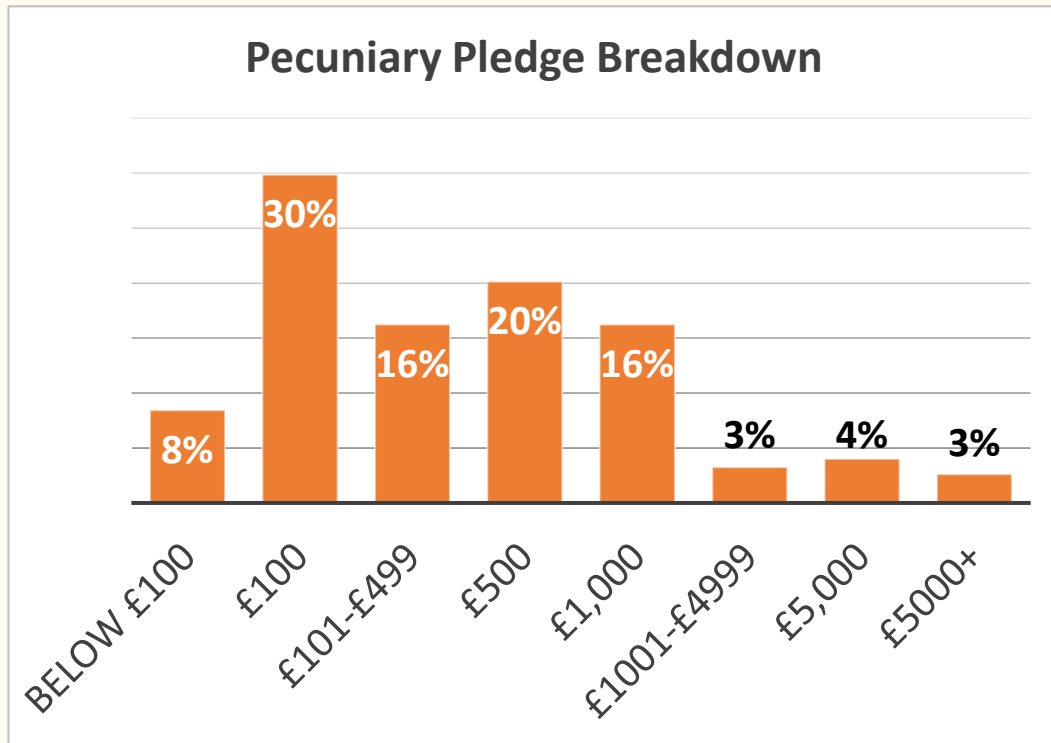
Residuary Gifts – a closer look



Residuary gifts cluster around:

- 1%,
- 5% and
- 10%

Pecuniary legacies – a closer look



Average Pecuniary legacy - £1600
(skewed upward by occasional HNW legacies)

Supporters show willingness to give.

A low figure pecuniary legacy is likely worth less than a low figure residuary gift

Completion and Engagement

Typical pledger:

Completes will in a single session

Includes a **cash gift (53%)** or **residuary gift (47%)**

Residuary clusters at 1%, 5% and 10%. Pecuniary legacies typically lower value (mode gift is £100)

Why this matters

Positive messaging and anchor points can influence behaviour

Implications

Review your messaging around residuary vs pecuniary?

Will this have an effect on messaging around anchor points?

BREAKOUT

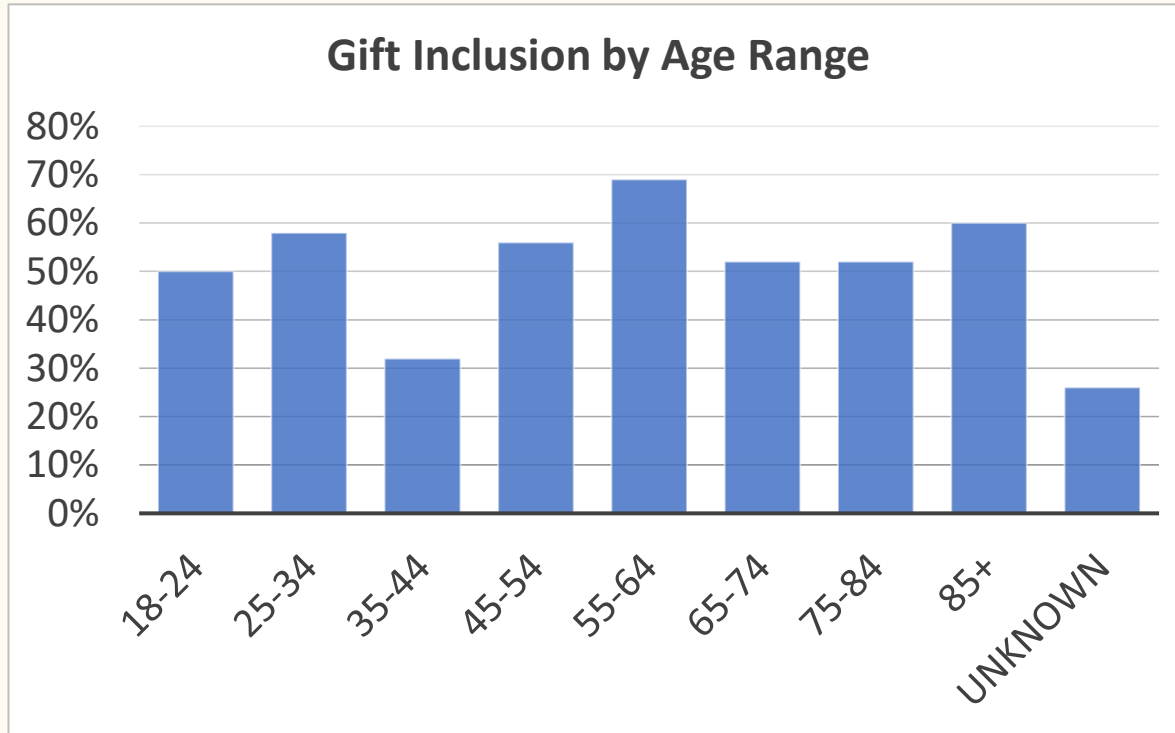


What effect (if any) will this have on your comms?

3 mins

Demographics

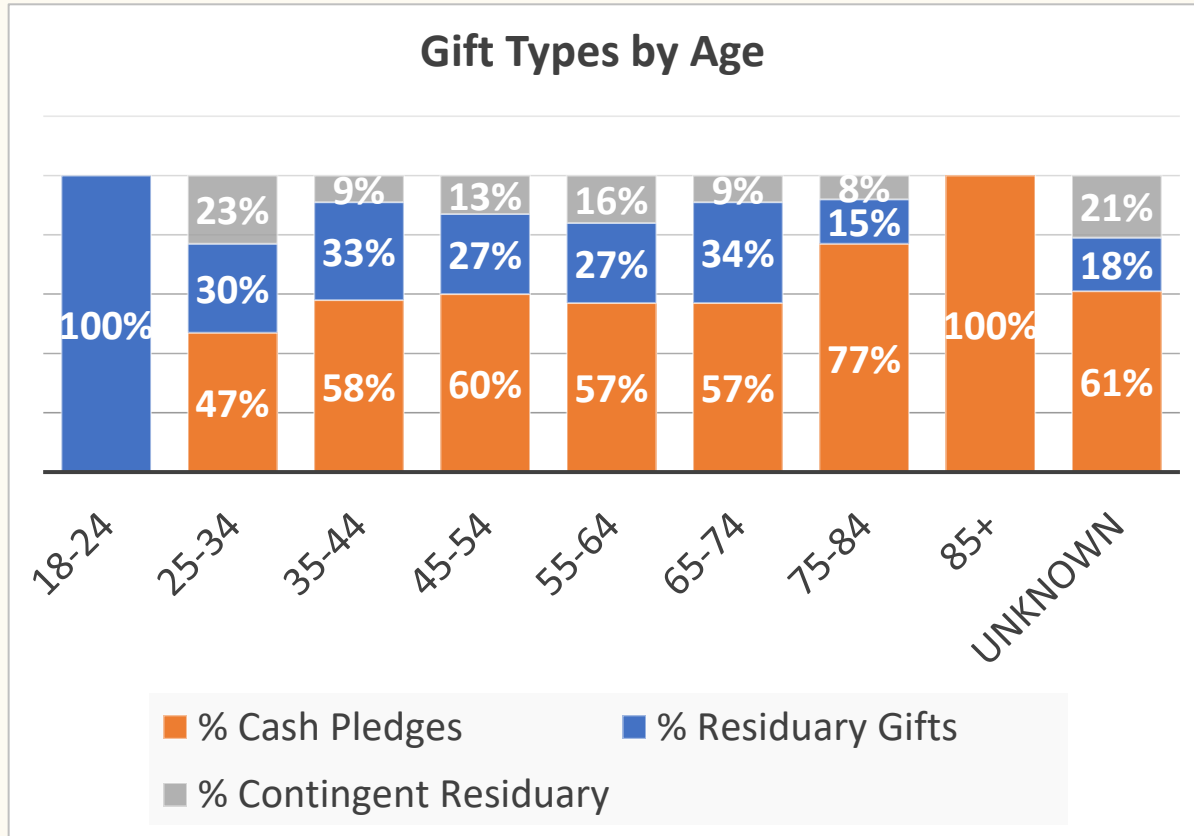
Gifts and age



Gift inclusion remains relatively stable across age groups

Highest proportion of gifts seen in the 55–64 bracket.

Gift Types by Age Group

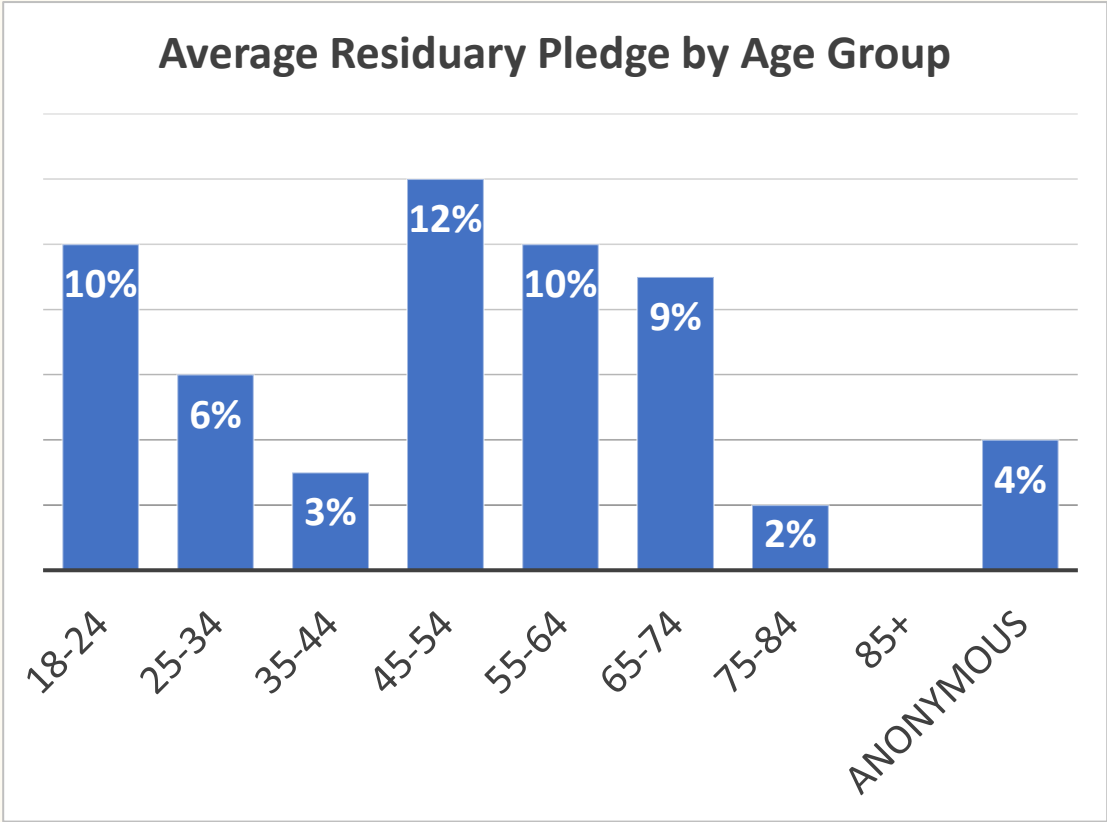


Varying preferences

Younger => residuary

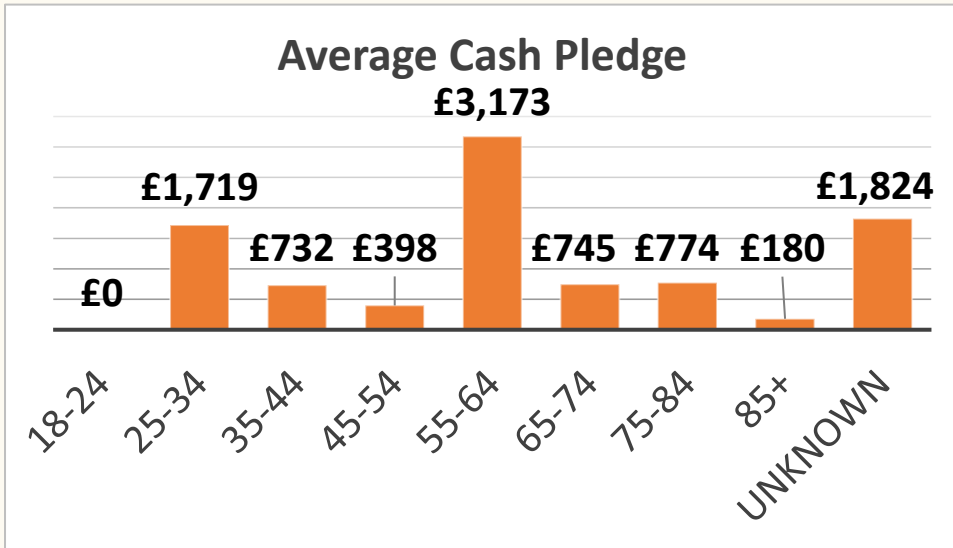
Older => pecuniary

Residuary Gifts – a close look



Highest average percentage pledged in 45-74 age group

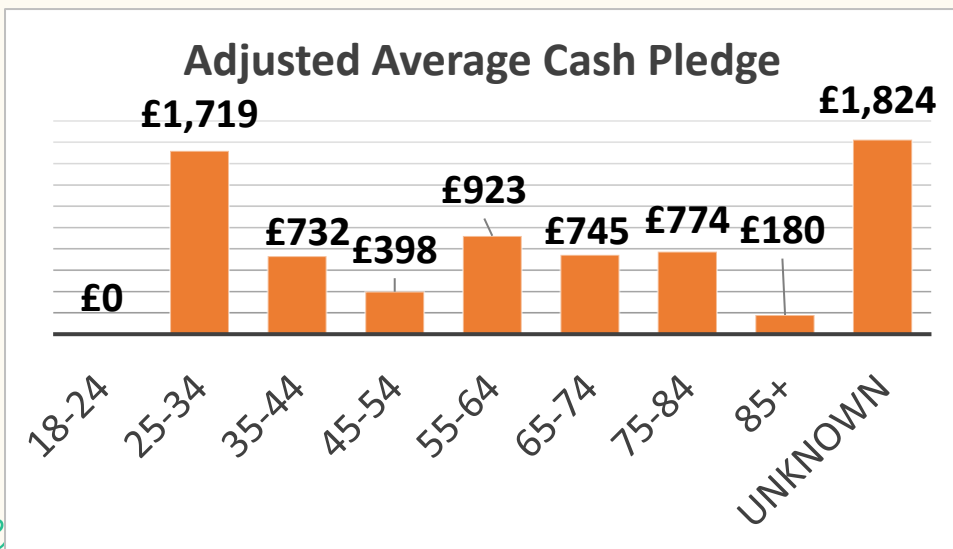
Cash Pledges by Age Group



55-64 skewed by HNW gift

Removing outliers reveals a more realistic and consistent view of average cash gift values across age groups.

Lowest average pledges at highest age.



Le

Gifts and Age Groups

Observations:

Younger and middle aged more likely to leave residuary gifts.
Value of cash pledges varies with drop-off at 85+

Questions:

Does an online platform view have a skew?
What other benchmarks does your charity use?

Implications for charities

How will these observations affect your charity comms?

Are you tailoring your legacy messaging based on age, or treating all supporters the same?

BREAKOUT

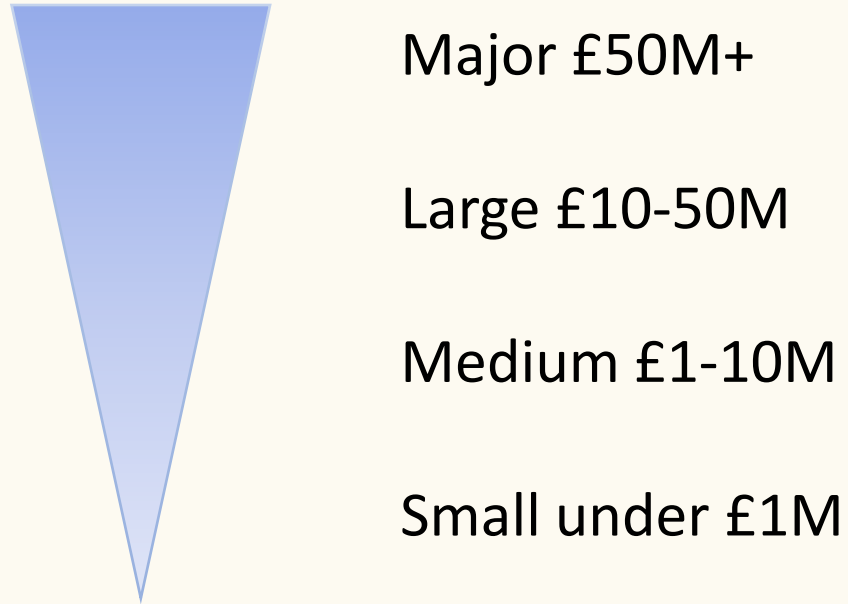
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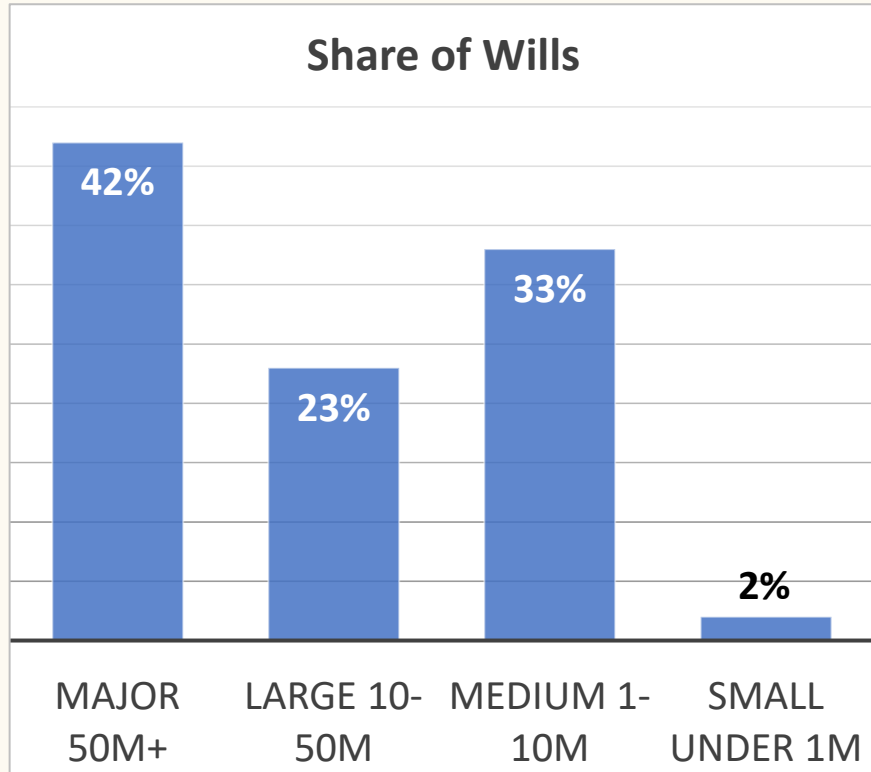


Charity Benchmarking by Income

Charity Benchmarking by Income



Share of Completed Wills



Larger charities account for a greater share of completed wills.

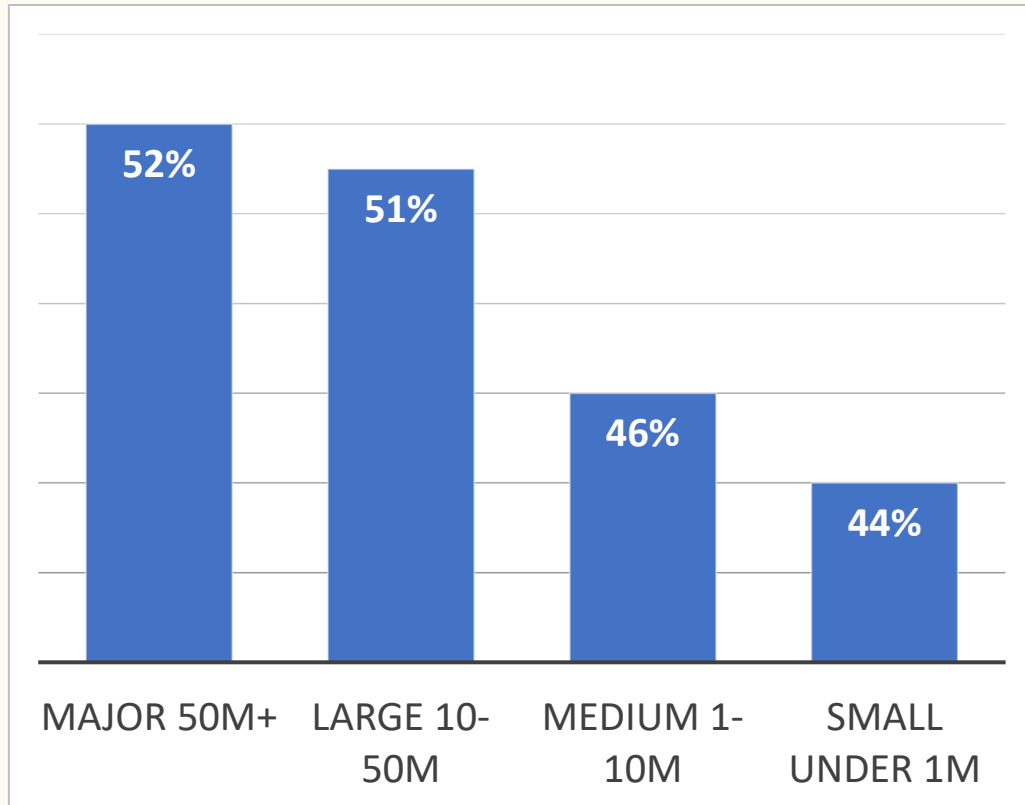
Reach?

Resources?

Historical gifts in wills messaging?

Other?

Will Completion Rates

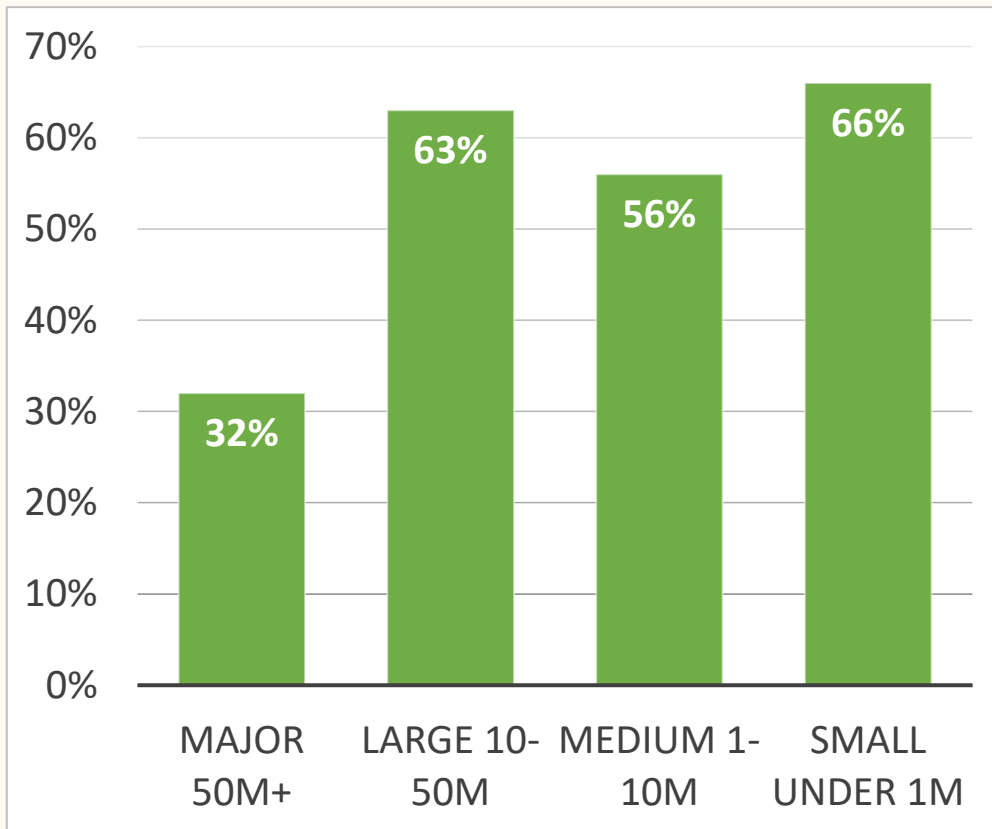


Completion rates vary by charity size

Largest charities have highest completion rates. Smallest have lowest.

But...

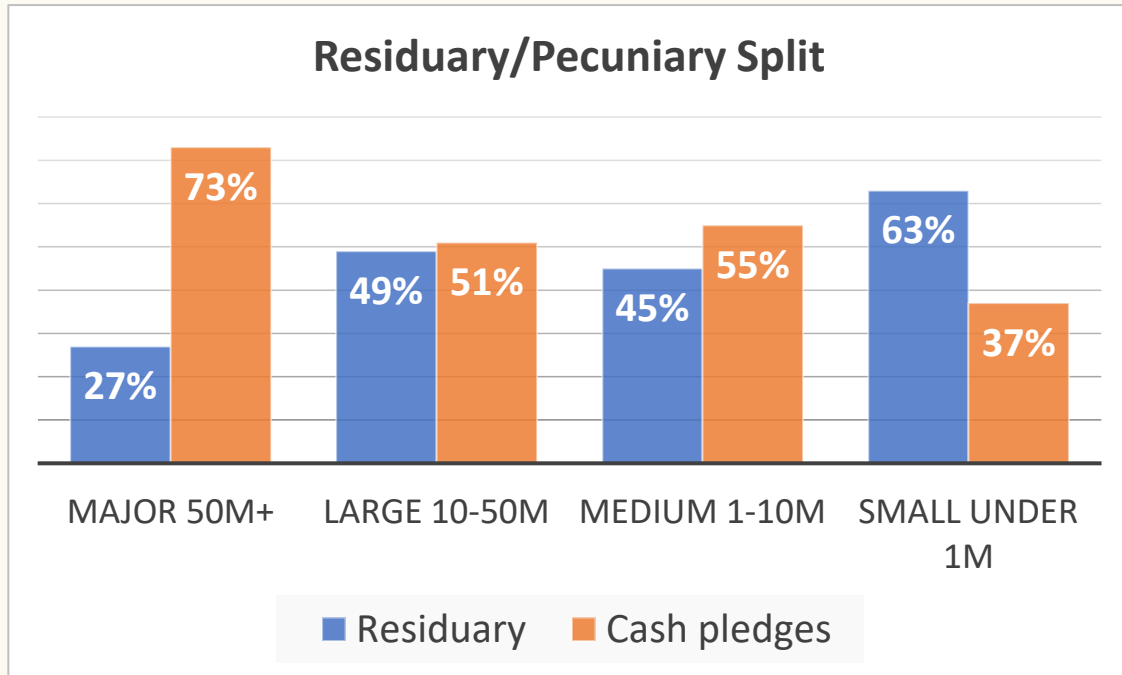
Gift Inclusion Rates



Largest charities have lowest gift inclusion rates.

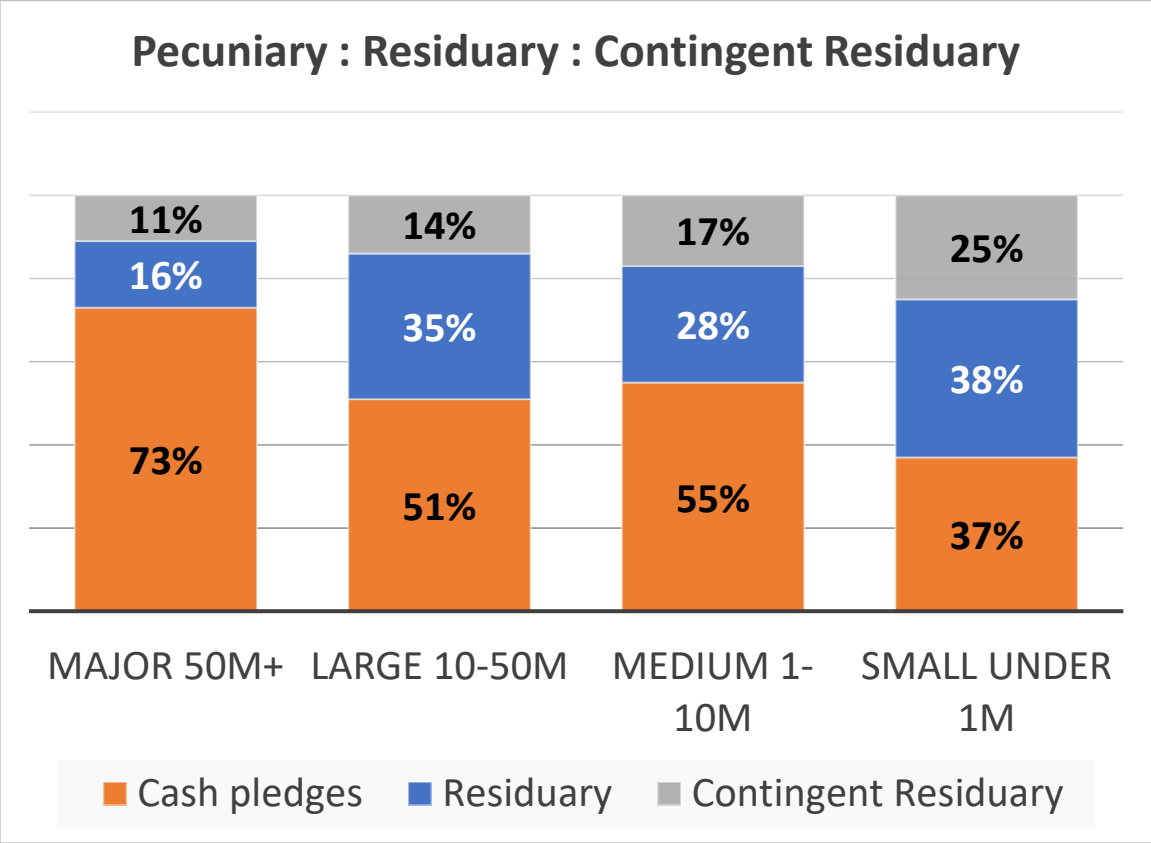
Smaller charities have highest gift inclusion rates.

Income Size - Gift Types



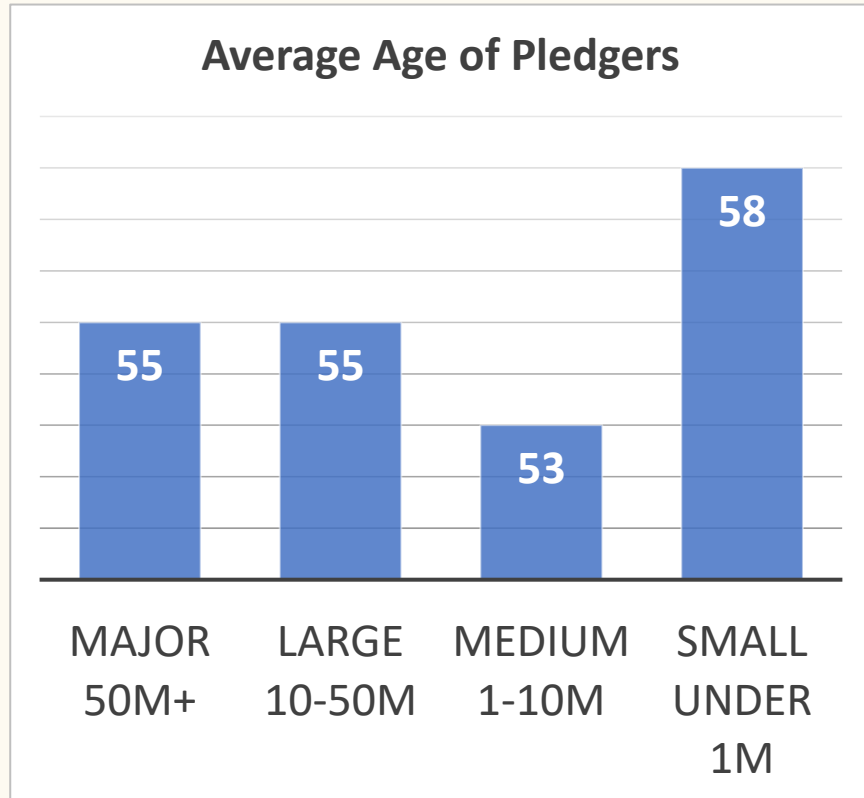
Smaller charities receive higher proportion of residuary pledges

Gift Types: a closer look



A deeper view shows patterns in gift type preference across income groups which could highlight strategic opportunities.

Average Age of Pledgers



The average age of supporters leaving gifts consistent across charity size

Charity Bench Marking by Income

Larger charities: higher volumes

Smaller charities: more gifts

Implications for charities

Smaller charities can compete by optimising engagement and conversion

Benchmarking helps identify gaps and opportunities for improvement

Understanding your position relative to peers can inform strategy

How does your legacy performance compare to similar-sized charities, and what can you learn from the differences?

Questions?

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