

Strategic Priorities

2022-2025

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

INTRODUCTION

Gifts in Wills have continued to grow over the past 20 years.


More people are now leaving a charitable gift in their Will than ever before, ensuring good causes can continue to deliver their vital work.

As we reach the cusp of the biggest intergenerational wealth transfer of all time, the coming years have long been predicted as an exceptional opportunity for legacy giving. Now, with such a marked increase in the public's appetite for Will-writing over the past two years, that moment is further magnified.

This is a unique opportunity not only to normalise legacy giving, but to provide a more financially resilient charity sector, ensuring that good causes can continue to provide critical services for future generations.

Remember A Charity will continue to do what no single charity can do on its own, growing the legacy market by encouraging more people to support their favourite charities in their Will.

We will continue to monitor legacy giving rates by tracking the percentage of charitable estates at probate. We will also monitor current Will-writing behaviour. This will include our annual consumer tracking survey, monitoring solicitors' attitudes to legacy giving and market segmentation data at key life stages such as retirement planning.



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OUR ROLE

- To grow the legacy giving market, creating change that no single charity can achieve on its own.
- Driving the public's consideration and action about charitable gifts in Wills.
- Creating a more favourable environment for charitable Will-writing.
- Championing legacy giving best practice as part of our wider, primary role to grow the market.

OUR STRATEGY

- 1 Normalising and inspiring charitable Will-writing at key life stages relevant to legacy giving.
- 2 Ensuring charitable giving is part of the Will-writing process.
- 3 Creating a more favourable environment for charitable Will-writing.

NORMALISING CHARITABLE WILL-WRITING AT KEY LIFE STAGES

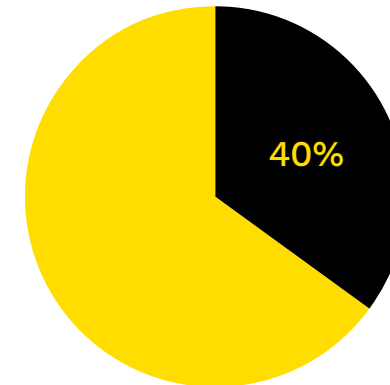
1

Our strategy will seek to address the current disconnect among the 40% aged 55+ (OnePoll, 2019) who say they'd be happy to leave a gift in their Will and the 19% of charitably minded adults who say they've left a gift in their Will (Remember A Charity, OKO, 2021).

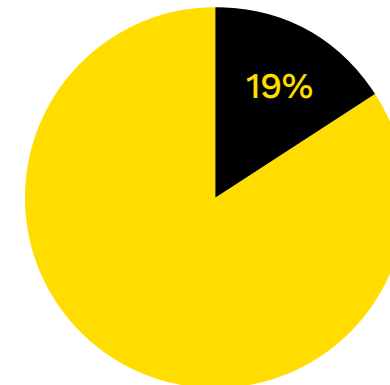
As part of this strategy, we will identify in Year 1 the key segments with our ABC1 55+ audience with the greatest opportunity to grow legacy giving. We will then develop targeted campaigns – informing and inspiring supporters with relevant, timely and trustworthy content on leaving a charitable gift. We will also grow legacy giving by ensuring our campaigns reflect the diverse communities that our charities serve.

We will also support our members to maximise their voice, giving them the platform to continue to be loud and effective about legacies.

Key metric: Our annual Stages of Change survey, monitoring the public's attitudes to identified key barriers to legacy giving – such as misconceptions around the size of gift and supporting family, friends and charity. We will seek to expand this survey to have a better understanding of key segments within our ABC1 55+ audience which have the greatest opportunity for growing legacy giving.



■ % OF PEOPLE AGED 55+ WHO WOULD BE HAPPY TO LEAVE A GIFT IN THEIR WILL



■ % OF CHARITABLY MINDED ADULTS THAT ACTUALLY DO LEAVE A GIFT IN THEIR WILL

ENSURING CHARITABLE GIVING IS PART OF THE WILL-WRITING PROCESS

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Most ABC1 adults die with a Will, but a fifth of adults claim their Will no longer reflects their wishes (Fastmap, 2020). Amongst 50+ charity supporters who haven't written a Will, 28% say they intend to write a Will soon.

Trusted advisors play a critical role in providing financial advice and supporting Will-writing. Almost one in four (23%) of adults say that they didn't leave a gift in their Will because they didn't think of it at the time (Remember A Charity, OKO, 2021).

Our key role is to therefore focus on conversion, encouraging those who write or update their Will to include a charitable gift.

Our key areas of focus will include:

- A** Ensuring solicitors, Will-writers and financial advisors consistently mention the charitable option when advising clients, developing:
 - i. Best practice guidance on how to raise the charitable conversation with Will-writing clients.
 - ii. CPD training on how to raise the option about gifts in Wills.
 - iii. Campaign Supporter scheme recruitment and stewardship, focused on the top 15 Will-writing firms and trusted financial advisors, helping to grow the number of charitable Wills written.
- B** Digital strategy to ensure that charitable giving is front-of-mind when consumers research online about 'making a will', ensuring the Remember A Charity website is a continuation of that user journey.
- C** Embedded charitable prompts as part of online Will-writing platforms.

A fifth of adults claim their Will no longer reflects their wishes

Amongst 50+ charity supporters who haven't written a Will, 28% say they intend to write a Will soon

3

CREATING A MORE FAVOURABLE ENVIRONMENT FOR CHARITABLE WILL-WRITING

We will create a more favourable environment for charitable Will-writing, making it easy and attractive to leave a gift; ensure the idea of legacies are promoted at a timely moment when making a Will; and normalise it by making it an attractive idea that more and more people are doing.

We will represent our members' voices, and those of the wider fundraising sector, on the key issues affecting legacy giving.

- A** Influencing Government who have the capacity to change the Will-writing environment in the UK.
 - i. Law Commission's review on Will-writing.
 - ii. Maintaining existing fiscal incentives and developing new incentives to help drive conversation about charitable giving.
- B** Closer collaboration with charity and legal sector bodies, such as ILM and The Law Society, to ensure a consistent external voice on matters affecting legacy giving, such as HMCTS' probate backlog.
- C** Closer collaboration with Will-writing partners, identifying new opportunities to influence positive change.
- D** Develop new strategic partnerships that help drive legacy giving, such as working closely with organisations who support ABC1s who are in the process of pension and retirement planning.
- E** Crisis management, speaking on behalf of the charity sector on issues that affect the public's trust and confidence in issues directly relating to leaving a legacy giving and writing a Will.
- F** Continue to support charities to help make the case for legacy fundraising, championing legacy sector knowledge and ensuring charities receive consistent and meaningful strategic and operational data.

OUR IMPACT

Our annual consumer benchmarking research surveys the attitudes and behaviour of 2,000 charity supporters aged 40+.

The 2021 survey indicated a strong correlation between awareness of Remember A Charity Week and legacy giving, with those who have seen or heard of the legacy awareness week being more than twice as likely to have left a gift in their Will.

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Remember A Charity is part of the Chartered Institute of Fundraising, which is incorporated by Royal Charter (RC000910) and is a charity registered in England and Wales (No. 1188764) and Scotland (No. SC050060)