

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

Our Impact in 2023

**“Together we continue
to achieve what no
single organisation can
do alone, growing the
legacy market
to generate vital
charitable funding.”**

Anaish Yilma-Parmar, Chair, Remember A Charity

Introduction from Chair



Despite the challenges of the current environment, I'm delighted to say that 2023 was another record-breaking year for gifts in Wills, and for Remember A Charity. Annual legacy income reached an estimated £4 billion¹, serving as a vital lifeline for a growing number of charities and community groups.

For Remember A Charity, 2023 was the first full year of our 'Always On' consumer advertising programme, which succeeded in driving record numbers of the Will-writing public to our website to find out more about our member charities and how to leave a gift in their Will.

When it comes to driving change, our work with legal networks and professional advisers has never been more important. We've equipped hundreds of solicitor firms and Will-writers with the tools and impetus to champion legacy giving with their clients. During the year, we welcomed new legal partners and Campaign Supporters, and

increased our focus on engaging wealth managers with the aim of growing high value legacy gifts. And it's wonderful to see their enthusiasm for having values-led conversations on legacies and philanthropy.

With an active public affairs and policy agenda, we've used our combined voice to protect the legacy giving environment, lobbying government to preserve fiscal incentives on charitable gifts in Wills and working collaboratively to address delays at probate.

Public appetite for legacy giving continues to grow, and our focus remains on closing the gap between people's intention to give and them taking action. As our collective efforts pave the way to unlock even more potential for legacy growth, I'd like to say a heartfelt thank you to all our members, partners, and Campaign Supporters for collaborating with us, and to thank our Former Chair, Allan Freeman, for his truly exceptional leadership.

Together we continue to achieve what no single organisation can do alone, growing the legacy market to generate vital charitable funding, shaping a better world for future generations.

Anaish Yilma-Parmar,

A handwritten signature in black ink, appearing to read 'ayilma' with a large, sweeping flourish above it.

Chair, Remember A Charity

Making legacy giving a social norm



21%

of supporters aged 40+ have included a charity in their Will²



Record web visitors of
322,000³



PR media reach of
578 million⁴



Social media reach of
5.1 million⁵

Attitudes and behaviours

Our central and collective mission is to grow the legacy market and normalise legacy giving. As part of this, our annual consumer benchmarking study carried out by OKO, which tracks legacy giving behaviours and attitudes, continues to show a steady rise in the number of people including a charitable gift in their Will⁶.

One fifth (21%) of charity supporters aged 40+ - and almost one third (31%) of those with a Will - say they have now left a legacy donation⁷. But with almost twice as many people (40%) saying they would be happy to leave a gift after taking care of their loved ones⁸, there is considerable room for further growth. With more charities fundraising for gifts in Wills, and charities ever more reliant on legacy income, that growth has never been more important.

Did you know...?
People who are aware of Remember A Charity are more than **TWICE** as likely to have included a charity in their Will as those who are unaware⁹



Consumer campaigns

For the first time, our consumer advertising campaigns in 2023 ran on digital channels all year round, with a suite of personalised assets available for members to use and make the campaign messaging their own.

Bringing legacy giving to life, we shared a combination of short and snappy informative 'How to' videos, as well as organic member stories with an emphasis on real life impact - which resonated strongly with consumers, reaching over 3 million people on Meta. Our inspirational 'Be Remembered' campaign launched during Remember A Charity Week, seeing Frank and his marrow take centre stage alongside a wider cast of characters that captured the attention of our Baby Boomer audience.

Starting in January 2023, to coincide with a seasonal spike in Will-writing interest, we used a test and learn approach to optimise advertising effectiveness throughout the year, with the goal of driving more people to our website and encouraging action. This resulted in exceptional year-on-year performance. We doubled our social media reach to 5.1 million, hit a website visitor record of 318,000 (more than doubling our previous record), and clocked up 500,000+ views for our educational video series.

Complementing our digital approach, we championed legacies with timely PR bursts, achieving a reach of 578 million¹⁰ across national, regional, and broadcast channels. Campaigns ranged from personal finance press at the start of the year, through to the launch of 'Willanthropy' in the Summer and Fatima Whitbread's celebrity boost and ambassadorial role throughout the Autumn.



500,000+ YouTube views



The 2023 Be Remembered campaign



Launching 'Willanthropy' - a new word for giving from your Will



Fatima Whitbread's celebrity boost

Normalising charitable Will-writing



72%
of solicitors and Will-writers raise the charitable option¹¹



875
Campaign Supporters¹²



50,000
media reach to the legal sector¹³



8 in 10
advisers are more likely to talk legacies after watching our training videos¹⁴

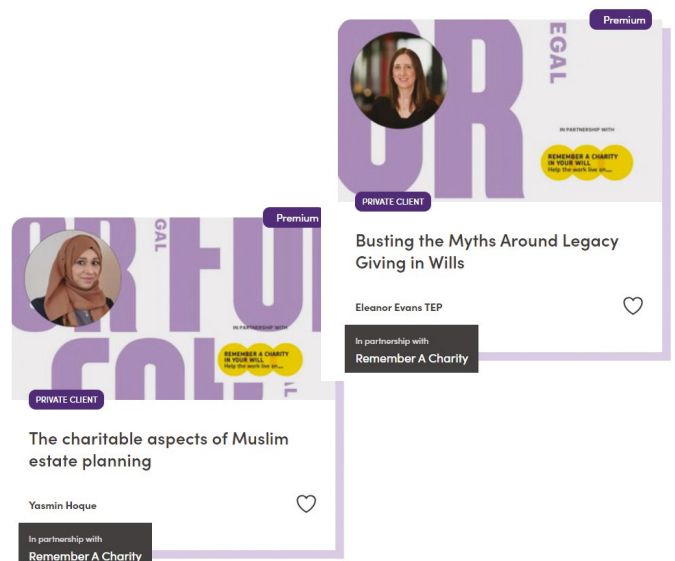
The role of professional advisers in normalising charitable Will-writing is crucial and so developing our legal network and partnerships has been a key focus of our strategic work in the last year. This includes the continued expansion of our UK-wide network of Campaign Supporters - 875 charity-friendly solicitor firms and professional Will-writers who commit to make clients aware of the option of including a gift in their Will.

Through our partnership with online legal provider For Legal, we provide CPD (Continuing Professional Development) compliant training videos on all aspects of charitable Will-writing. This partnership enables us to reach 8,000 solicitors and other legal professionals throughout the year, and advisers are responding positively to our content – with 8 in 10 advisers saying they are more likely to raise the charitable option with clients after viewing these sessions¹⁵.



New Charity Champion scheme launched in 2023

September brought the launch of our new Charity Champion initiative to equip and empower organisations to get involved and share the legacy giving message throughout Remember A Charity Week.



“We are proud to support Remember A Charity and use their annual Remember A Charity Week as an opportunity to engage with our charity clients, promote the benefits of charitable giving, and encourage individuals to consider leaving gifts in their Will.”

Eleanor Evans – Partner and Head of Trusts and Estates Administration at Hugh James

Working with wealth managers to grow high value legacies

Last year, we refined our work with financial advisers to place greater focus on those working with high net worth clients - those who have the greatest capacity to donate.

An initial scoping project, led by Sianne Haldane of Boon Philanthropy, found that wealth managers are keen to discuss the concept of legacy giving with clients, but few do so currently or are confident in their knowledge of the topic.

To help advisers play a more active role in advocating for legacy giving, we have channeled information on charitable bequests into ongoing philanthropy training for advisers (delivered by Philanthropy Impact), and shared insights through established adviser networks and media.

The next phase of this project will see the development of a best practice guide for wealth managers, equipping them to have discussions with their high net worth clients about legacy giving as part of their philanthropic planning.



Nurturing the legacy environment



Commitment from HMCTS

for a new charitable indicator on probate applications



New information to be provided on

probate caseloads



Lobbying for

protection of the fiscal incentives

As a collective voice for charities that rely on legacy income, 2023 was an active year for change and influence. We fed into the Law Commission's consultation on the future of Wills, and highlighted to Scottish government the challenges for

charities without a legacy notification system due to the high cost of access to Scottish Wills. And we accelerated our work on probate delays and protecting the tax incentives for legacy giving.



Probate delays

With an estimated £800-£900 million of charitable income tied up within the probate system towards the end of 2023¹⁶, we partnered with the Institute of Legacy Management (ILM) to influence change and ensure the impact on charities remains front of mind for HMCTS (HM Courts & Tribunals Service). Representing the sector on the HMCTS Probate Service Users Working Group and within the Probate Inquiry, we've continued to advocate for the provision of more data about probate caseloads to help charities improve their forecasting.

This led to the Probate Registry's commitment to provide more data on probate applications and grants, and introduce an indicator in order for charitable estates to be identified and enable clearer reporting on those applications as they move through the system.

Inheritance Tax

The fiscal incentives for legacy giving not only encourage giving but are crucial when it comes to ensuring advisers highlight the charitable option with clients. With rumours that Inheritance Tax (IHT) could be scrapped or reformed, Remember A Charity lobbied government to protect the tax advantages.



**Championing legacies
at the heart
of government**

“Working closely with key players within HMCTS and our partners at ILM, Remember A Charity’s collective voice has become increasingly influential when it comes to operational decisions and future service design considerations. This has already led to specific commitments to provide enhanced reporting and forecasting information that will benefit the whole sector. Together, we continue to drive positive change and do all we can to help keep legacy income flowing.”

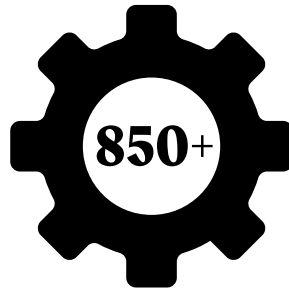
Alex McDowell, Director of Fundraising at The Duke of Edinburgh's Award

Supporting our members

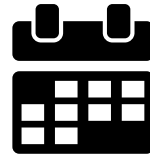


charities

have been members of the consortium for over 10 years¹⁷



personalised legacy marketing assets created for members¹⁸



More events and resources

16 member events & a growing bank of legacy resources¹⁹

With more and more charities fundraising for legacies, market growth is essential to enable charities to protect their market share. As a collective movement, Remember A Charity gets into the spaces that individual charities can't

– interacting with the Will-writing profession, government, and influencers – and placing our members at the forefront when it comes to driving change and inspiring action.

“The RSPCA has been a member of Remember A Charity for over 20 years. We’re proud to be part of such an important body that has affected significant change for the sector during that time, and we continue our membership confident that Remember A Charity’s ongoing drive and ability to evolve to ever changing market needs and challenges, whilst maintaining its core purpose, provides valuable input to the work we do at the RSPCA, and for all other charity members.”

Jessica Bayliss, Head of Legacy Marketing at the RSPCA

Breadth of membership

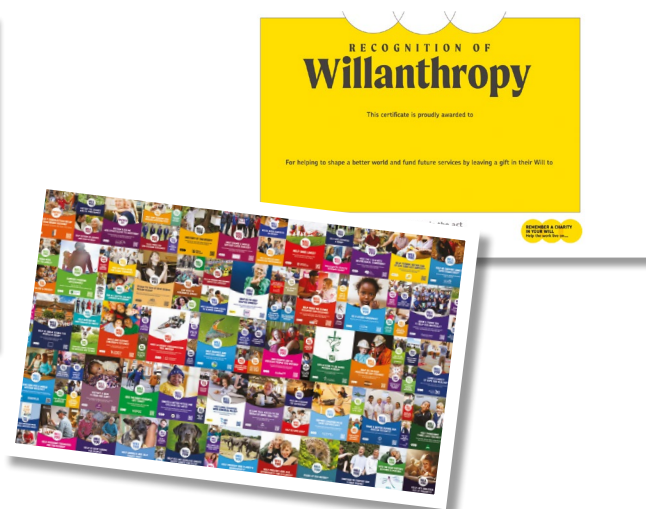
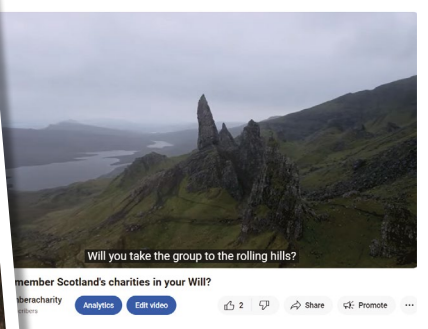
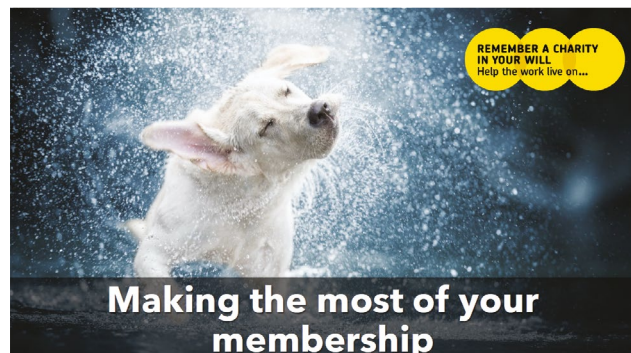
Representing over 25 different causal areas, Remember A Charity's membership represents a diverse range of charities of all shapes and sizes – active on a local, regional, national, and international scale. While many of our members are large household names, including the top 5 charities by UK legacy income²⁰, 20% of our members are local, community-based charities²¹.



Our members span the breadth of the UK, operating nationally and at a local level

New resources in 2023

We continued to amplify members' voices and protect their interests on the national stage, whilst providing them with the tools, insight, and learning opportunities they need to take their legacy programmes to the next level.



What's next?

As we draw closer to making legacy giving a social norm, collaboration is key. We will continue to use our collective influence to maximise opportunities for growth – educating and inspiring an ever-expanding pool of potential legacy supporters, activating our network of professionals to serve as legacy advocates, and nurturing our members and the wider legacy environment.

Stay tuned - sign up for our Legacy Bulletin for more updates and legacy news





**REMEMBER A CHARITY
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Remember A Charity is a consortium of almost 200 charities working to grow the UK legacy giving market and to support charities with their legacy fundraising. The annual Remember A Charity Week is held in September, serving as a platform for member charities to champion gifts in Wills. The consortium also runs high profile consumer campaigns all year round, while working with legal partners and Government to nurture the wider legacy environment.

Visit: rememberacharity.org.uk

Contact: info@rememberacharity.org.uk

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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)