Audience-led legacy fundraising

Be Inspiring. Be relevant. Make it easy.

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Fundraising Everywhere Conference

When you think about the legacy giving audience, who do you think of?

In the chat: who do you picture when you think of the legacy giving audience?

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Old and affluent



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Born eleven days apart in 1948. Almost nothing else in common.

Same decade, same tax bracket, poles apart in upbringing, family and probably values.

In the chat: who do you picture when you think of the legacy giving audience?

Legators are asset rich and almost invisible to you

There are stereotypes for a reason.

77

average age at signing the final will. They die at 84.

£599k

average estate of a charitable legator, against £394k for everyone else

43%

of people with no children leave a gift, against 28% of those who have them

2.9

charities named per charitable will. 37% name only one.

Asset rich, income modest, disproportionately without children, loyal to very few charities, and almost entirely invisible to you.

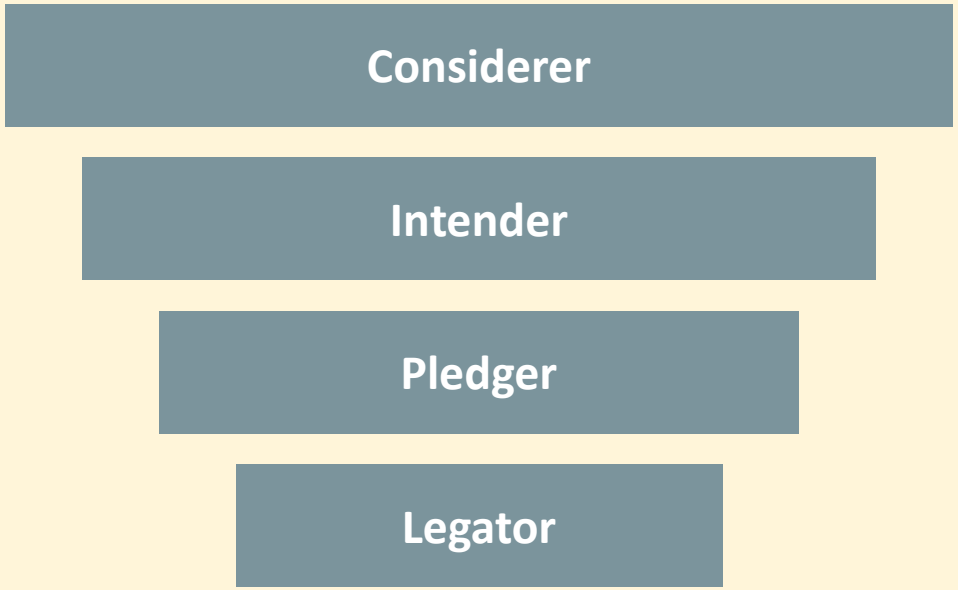
Only 20 - 50% of legacies are ever disclosed to the charity receiving them.

But every supporter has the potential to leave a gift in their will.

Sources: Smee & Ford; The Legacy Giving Report 2025 and 2026; Populus; Invisible Legator research, Legacy Foresight

Your pipeline measures serves internal purposes

Inside - out



Common stages in the pipeline.

Outside in

"I'd like to include you,
but I haven't sorted out
what is right for my family."

The problem they are actually trying to solve.

Which one represents your programme?

A gift is one decision inside a much bigger task

Making or revisiting a will

Who inherits	Property and savings	Executors	Guardianship
Funeral wishes	Tax and costs	Finding a solicitor	**A gift to charity**

Charities are operating in the will-writing market and are one of many players

What is the charity's role? Where can we help? And when should we step back?

Most legacy programmes are built around the charity's comms calendar.

Supporters are working to a different one.

Few people write one will

Most people write 3 types of will, decades apart. There is a different job to be done at each.

The first will

Around 50, on average

SUPPORTER'S JOB

Get this off the to-do list and protect the people who depend on me. This is admin, not philanthropy. Charities are barely in the frame.

CHARITY'S JOB

Be known well enough to come to mind and make inclusion effortless if it does. A genuinely simple will offer earns its place here, because the barrier is friction rather than feeling.

The reflective will

60s to early 70s

SUPPORTER'S JOB

Work out what I stand for, what my life has added up to, and what I want to be remembered by. This one is about identity and values.

CHARITY'S JOB

Inspire them. This is where a gift stops being a transaction and starts being a statement about who they are, and where a share of the estate becomes a possibility.

The final will

Signed at 77, on average

SUPPORTER'S JOB

Settle it. Make sure it is right, fair and final, often under time, health or family pressure.

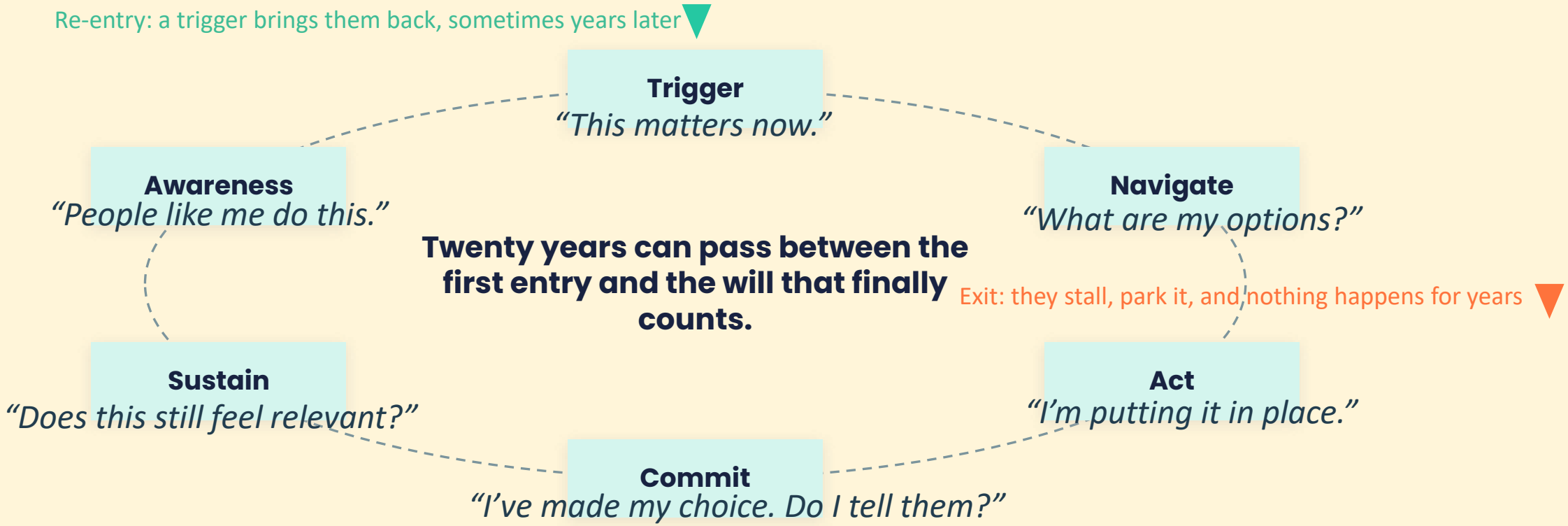
CHARITY'S JOB

Still be there and be easy to name correctly.
The risk here is not rejection. It is being forgotten or written incorrectly.

Sources: The Legacy Giving Report 2026; Smee & Ford; Sanders et al on first-will social norm effects

The Gifts in Wills Decision Map

A supporter can sit at one decision point for years, drop out entirely, and come back through a different door.



Where is your charity’s place to play on this map?

Meet Meadowbank Hospice

A fictional charity, invented for this session. Any resemblance to a real organisation is unintended.

The organisation

- Hospice serving a market town and the countryside around it
- £3.2m income. Six charity shops, community fundraising, an annual light-up-a-life appeal
- 9,000 supporters on the database, average age 68
- One fundraising manager. No legacy specialist

Where legacies stand

- £480,000 last year from six gifts. All of them pecuniary
- Not one of the six legators was known to the fundraising team
- A free will offer, promoted once a year in the newsletter
- A legacy page on the website and a leaflet in the shops
- The board thinks legacies are already working

“I know that leaving money to charity in a will is a thing that people like me do.”

Behavioural insight

Social proof and availability

Wills are private, so the behaviour is often invisible.

People systematically underestimate how normal it is, and we take our cues from what we believe others like us do.

What the evidence says

- 22% of supporters aged 40+ say they have pledged a gift, up from 14% in 2010
- 55% of adults in UK gave to charity in 2025

Source: OKO for Remember A Charity, in The Legacy Giving Report 2026; CAF UK Giving Report 2026

Most of this decision happens without you

Two audiences you do not control but need to consider.

The supporter

"What feels right for the people and causes I care about?"

Family and friends

"How do I help their memory live on?"

They often hear about it first, and they honour it afterwards. A surprise is a risk.

Solicitors and advisers

"What would you like the will to say?"

They need to feel comfortable prompting about charities

The person deciding is rarely deciding alone.

You cannot be in that room. You can make sure the answer is easy to find when the question comes.

Inspire. Be relevant. Make it easy.

This is the role of the charity.

Be Inspiring	Connect the gift to something they already care about.	*“What difference could I make?”*
Be relevant	Understand their circumstances and what they need.	*“Does this fit my life and values?”*
Make it easy	Offer clear information and a route to suitable help.	*“Who helps me take the next step?”*

Useful support includes knowing when to give space.

The audience approach to getting internal buy in

Stakeholder	Typical Objection	How to respond
Board/Trustees	“It feel uncertain, how do we know it will pay off”	Around 1,000 charities in the UK - of all shapes and sizes - are now relying on legacies for an average of 30% of their voluntary income. Forecasts show that legacy income will grow. If we’re not visible in this space, we’ll miss out on future gifts.
CEO/Exec Director	“We need income now, not 10 years from now…”	The audience opportunity is now. In a competitive landscape, we’ll likely miss this opportunity by not investing in a 15:1 ROI channel vs other income streams. Missed investment means missed gifts
Fundraising Director	“We don’t have capacity to add legacies…”	Legacy activity complements existing channels. It’s doesn’t require huge new teams - just consistent messaging and prioritisation.
Communication leads	“It’s too sensitive - we don’t want to upset supporters…”	71% of over 65s have a Will already. Legacy giving is hopeful and future-focused. It’s not a discussion about death, and it can be deeply empowering and inspiring.

Leaderships teams have often never come across a fundraising product like legacies: they need to understand it and build trust to become an advocate.

Any questions?

Take the handout.

Some starter tips to applying the Decision Map to your supporter journey.

If you want help applying the Decision Map to your own charity, come and find me, quote this conference for 10% discount.
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