



# The Art of Legacy Fundraising

David Burgess

Director  
Apollo Fundraising

*Helping arts, culture and heritage organisations  
fundraise with confidence*

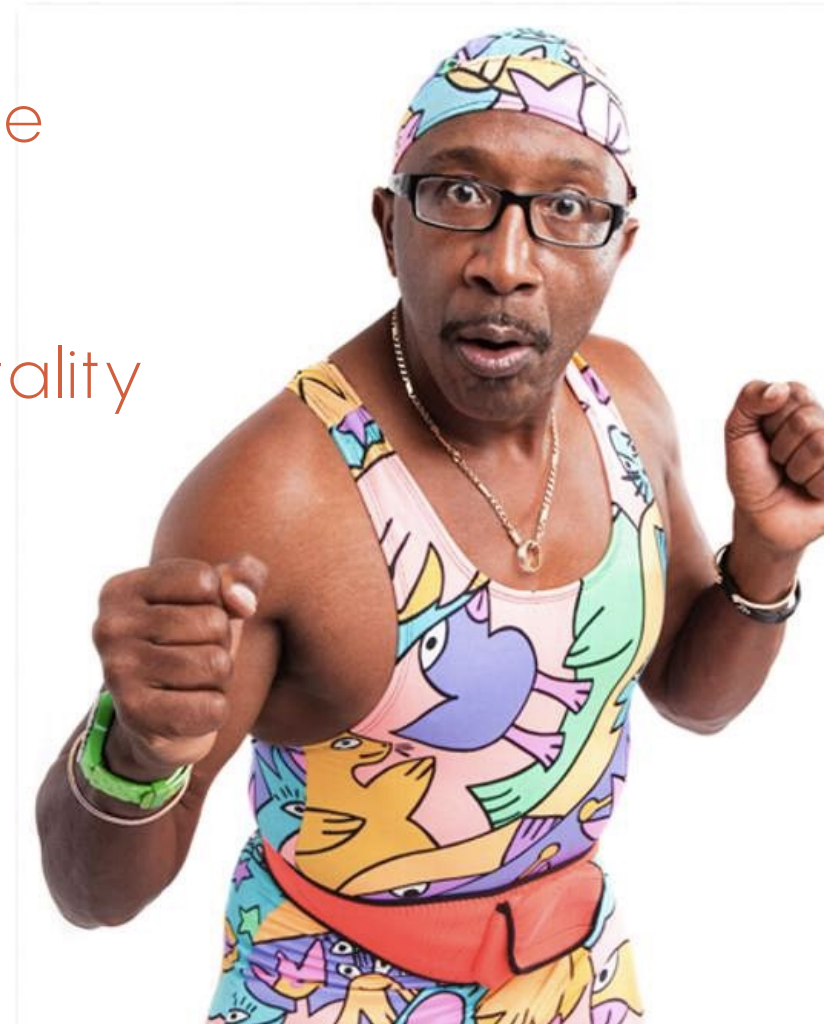
**REMEMBER A CHARITY  
IN YOUR WILL**  
Help the work live on...

“The great joy to be had from creating a Will is that it allows you to choose the memorial you most want for yourself.”



# Common Motivators

- ⊗ Connection to cause
- ⊗ Connection to organisation
- ⊗ Chance to make a big difference
- ⊗ Say Thank You/Give Back
- ⊗ Sense of duty
- ⊗ To be remembered/buy immortality
- ⊗ To remember another
- ⊗ Spite/keep away from other
- ⊗ Sense of guilt
- ⊗ Tax/Estate planning
- ⊗ Reflect "life narrative"
- ⊗ External advice
- ⊗ Nobody else to give it to



# Legacy Giving in the UK

- ⊗ Estimated £3.9 billion in 2023 – highest recorded
- ⊗ 38,178 charitable Wills
- ⊗ 13.7% of probated Wills included charitable gift
- ⊗ 6.6% of total deaths
- ⊗ Charitable estates worth £22.6bn



<https://smeeandford.com/reports-whitepapers/2024-smee-ford-legacy-trends-report-download/>

# Legacy Giving in the UK

- ④ 10,951 organisations received a legacy
- ④ 2,423 mentioned for the first time
- ④ Most popular causes for first timers includes Culture and Heritage
- ④ 37.1% gave to just one charity. 21.7% to two.
- ④ One Will included 79 charitable gifts



# Legacy Giving for culture?

- ④ 34 cultural orgs in the top 1,000 legacy orgs
- ④ Received £30m in 22/23
- ④ Grown by 10% per annum
- ④ Not just large/national orgs

<https://www.rememberacharity.org.uk/about-us/for-charities/legacies-and-the-arts>



# Why should you care?

- ⊗ Growing opportunity
- ⊗ Long-term, unrestricted funding
- ⊗ Boomer Generation care about the arts
- ⊗ Complete the journey for your loyal supporters
- ⊗ Excellent ROI... eventually



# Looking to the future

- ⊗ Increase in death rate – 700k by 2030
- ⊗ Traditionally philanthropic generation
- ⊗ More people die without “heirs”
- ⊗ Decrease in house prices?
- ⊗ Cost of living?
- ⊗ Cost of growing old/dying?



*“Over the next three decades £5.5trillion is expected to be passed down from Baby Boomers to the next generation, and it’s a cohort of strong charity and community-minded supporters who want to see the world become a better place.*

*Many have a deep-rooted passion for the arts, for heritage, for culture, and hope to safeguard the creativity, historic and cultural places and treasures, together with the arts profession and other forms of creativity for generations to come.*

*So, the sooner organisations are able to share the legacy message with supporters, visitors and service users alike, the greater the benefit will be.”*

The Art of Legacies 2024

# Talk the Talk



# Legacy Lingo — Types of Gift

- ⊗ Residual Percentage of Estate
- ⊗ Pecuniary Specified cash amount
- ⊗ Specific Items or assets
- ⊗ Reversionary Ownership switches over time
- ⊗ Conditional Requirements or conditions

# Residuary (%) v Pecuniary (Cash)

Average Gift

£50,900



Average Gift

£3,400

# Specific legacies



In 1982 Polish pianist Andre Tchaikowsky left his body to medical research and his skull to the RSC to be used as a prop. It was used for Yorick in 2008 production of Hamlet

# Specific legacies

- ⊗ Be clear about if there are specific things you can't/won't accept, and that you can't accept everything
- ⊗ Encourage people to contact you first to discuss their intentions
- ⊗ Negotiate with Executor — for instance, could it be sold?
- ⊗ You can legally refuse gifts if the negative impact on the charity outweighs the value of the gift

# Acceptance in Lieu Scheme

- ⦿ Enables people with an Inheritance Tax liability to pay it by giving art, cultural objects, important land or buildings for the nation
- ⦿ Offers are made to HMRC, who refer to ACE and then Secretary of State at DCMS
- ⦿ Donors can specify an organisation or institution, or ACE will advertise for orgs to apply
- ⦿ Receiving orgs must meet public access criteria – usually min 100 days per year
- ⦿ Public bodies can pay the difference if value of goods exceed tax bill

# Legacy Lingo — People involved

- ⊗ Testator Person who has made the Will
- ⊗ Executor Responsible for carrying out wishes
- ⊗ Beneficiary Person/org receiving something
- ⊗ Probate Court Grant probate & oversee executor
- ⊗ Estate Property, money and assets



# Legacy Lingo — Mechanisms

- ⊗ Will                      Legal doc, signed and witnessed
- ⊗ Codicil                      Update/change an existing Will
- ⊗ Letter of Wishes              Non-binding expression of wishes
- ⊗ Intestate                      Dying with no Will

# Legacy Lingo — Inheritance Tax

- ⦿ Tax of 40% on estates valued over £325,000
- ⦿ Only paid on amount over the £325k threshold
- ⦿ Not normally paid if you leave excess to spouse, civil partner, charity or CASC
- ⦿ Threshold can increase to £500,000 if you leave your home to your children or grandchildren
- ⦿ Rate drops to 36% if donate 10% or more to charity

# Legacy Lingo — Reasonable Provision

- ④ Ilott v Blue Cross and Others - Inheritance Act gives right of Reasonable Provision to specific categories of people, including children, spouses, dependents and cohabitantes
- ④ The person's aged does not rule them out
- ④ A Letter of Wishes might be considered but doesn't have automatic legal status



Step 1:

Who is your  
Target Audience

# A "Typical" Legacy Donor

- ⊗ 60% female v 40% male
- ⊗ Dies aged 84
- ⊗ Adds charity gift in last 7 years of life
- ⊗ Lives in South East
- ⊗ Support 3 charities
- ⊗ For arts: 90% over 70, 76% over 80



# Start with looking at three groups

- ⊗ Previous legacy donors
- ⊗ Current pledgers
- ⊗ High engagement and commitment

# What can you learn from previous Legacy Donors?

- ⊗ Demographics?
- ⊗ Age at death?
- ⊗ Date of Will when gift added?
- ⊗ Previous relationship with charity?
- ⊗ Type of legacy?
- ⊗ Any restrictions?
- ⊗ Other causes supported?

# High engagement and commitment

- ⊗ Long-standing Friends/Members/Patrons
- ⊗ Regular donors
- ⊗ Regular, long-standing audience
- ⊗ Volunteers (including Board)
- ⊗ "In Mem" donors



# A note on "The Others"



# Your most engaged prospects

- ④ What parts of your work are most/least important to them? Why?
- ④ What are their aspirations for your charity (and wider world) 30 years from now?
- ④ What shared experiences/memories do they have?
- ④ What values/identities would they use to describe themselves?
- ④ What values/identities might they aspire to?
- ④ What other charities/orgs might they support?
- ④ What might they be grateful for?
- ④ How might they like to be remembered?
- ④ Anything else?



**GREENPEACE**

**Keep your rebel spirit alive.  
Leave a gift in your will to Greenpeace.**

Greenpeace 'Rebel Spirit' Video -  
<https://www.facebook.com/greenpeaceuk/videos/326010634979874/>



Step 2:

Finding your  
legacy  
proposition

# Fundraising is giving people an invitation...

...to change something

...to fight for something

...to fix something

...to create something

...to believe in something

...to be part of something

...to stand for something

...to save something

...to share something

...to be something

...to buy/get something

...to celebrate something

# Legacy giving is an invitation...

...to keep changing something

...to keep fighting for something

...to keep fixing something

...to keep creating something

...to keep believing in something

...to keep being part of something

...to keep standing for something

...to keep saving something

...to keep sharing something

...to keep being something

...to keep celebrating something

Bletchley Park helped provide our country with long term security and we hope you might consider a gift to secure our future.

The site at Bletchley Park needs massive restoration and increasing visitor numbers means it is struggling to serve all those who want to come and re-live the extraordinary years which changed and saved so many lives. We are determined to ensure that future generations can bear witness to the amazing work of Alan Turing and all the Codebreakers. Please help us make this happen through a gift in your Will.





# YOUR LEGACY

[Home](#) › [Join and give](#) › Your legacy

**By remembering us in your will, you can shape a bright future for the arts in Wales for generations to come.**

A gift in your will is a meaningful way to celebrate your love for Wales Millennium Centre and make a lasting contribution for future generations.



<https://www.youtube.com/watch?v=UTfzRzqA8WM&t=72s>

**BLETCHLEY**PARK

Keep Turing and the  
Codebreaker's story alive



CANOLFAN MILENIWM CYMRU  
WALES MILLENNIUM CENTRE

Shape the future of Welsh  
art and culture

**National  
Theatre**

Pass on the magic of  
theatre



*Helping arts, culture and heritage organisations  
fundraise with confidence*

# Legacy Proposition

⊗ Real

⊗ Inspiring

⊗ Possible

# The RIP Factor

A **Real** legacy vision is:

- ⊗ Tangible
- ⊗ Unique to the organisation

An **Inspiring** legacy vision is:

- ⊗ Ambitious
- ⊗ Aligned with a clear motivation/value/passion held by your potential donors
- ⊗ Communicated in an inspiring, passionate way

A **Possible** legacy vision is:

- ⊗ Credible/achievable
- ⊗ Clear about the impact a legacy gift would have

# What is your Legacy Proposition?

- ① What is your vision and mission?  
Where do you want your organisation to be in 30 years time? (REAL)
- ② What inspires your supporters? What are their passions? How does this align with your projects/needs? (INSPIRING)
- ③ What impact will legacy gifts have? (POSSIBLE)



Step 3:

Promoting  
legacy giving

# When do people write or change their Will?



Family



Wealth



Health



# ...but reality is we don't know

So the purpose of our legacy marketing is:

- ④ To keep our organization top-of-mind when the time comes
- ④ To inspire/excite people about the potential of their gift
- ④ To overcome the main barriers that lead to people not leaving a gift





What barriers  
stop people  
leaving a Gift in  
their Will?

# Common legacy barriers

- ⊗ I don't do "charity"
- ⊗ I don't have anything to give
- ⊗ It's not for people like me - it's just for rich people!
- ⊗ I didn't know your organisation needed it
- ⊗ I didn't think of your organisation
- ⊗ I want to look after my family
- ⊗ I think it is too difficult

# ...so your marketing needs to show:

- ⊗ People can leave a legacy to your organisation
- ⊗ Legacies are important to your organisation
- ⊗ Gifts of all sizes can have real impact
- ⊗ Leaving a gift in your Will is easy to do
- ⊗ It is not expensive (and could save the donor/their family money in the long-run)
- ⊗ Other people like them are already leaving gifts
- ⊗ It does not mean disinheriting family
- ⊗ Leaving a gift is something they want to do



*"once you have provided for your loved ones, why not consider..."*

Over half a million children suffer abuse or neglect in the UK a year. After you've taken care of the people closest to you, a legacy gift in your will could help us be there for every child.

**NSPCC**



# Drip feeding and prospect targeting

# Drip Feeding your message

- ④ Use stories
  - ④ Received
  - ④ Pledged
- ④ Examples your target audience relate to
  - ④ Represent
  - ④ Aspire
- ④ Include on "action menus"
- ④ Encourage responses



- I would like to join your mailing list
- I would like more information about becoming a Friend/Member
- I would like more information on leaving a gift to you in my Will
- I would like more information on volunteering
- I would like more information about fundraising events in my area



# Legacy Mailing response mechanism

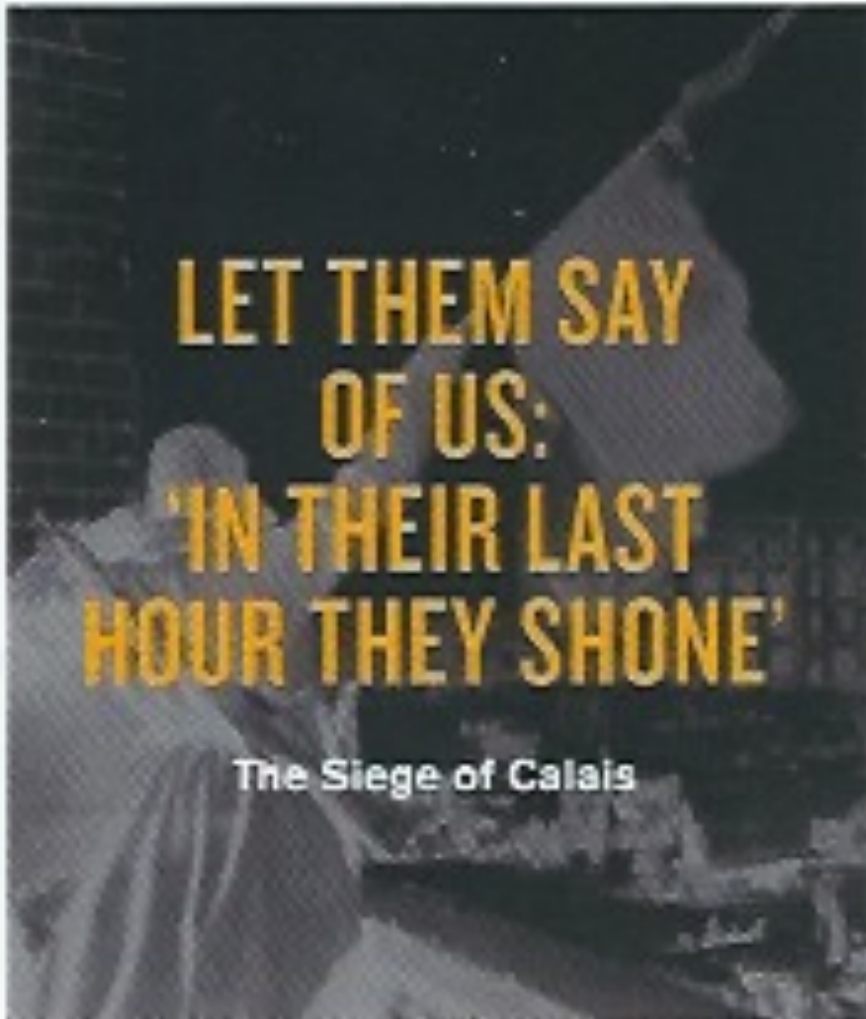
- I am considering leaving a gift to Anytown Theatre in my Will and would like more information/ to discuss this further.
- I am considering leaving a gift to Anytown Theatre in my Will and have all the information I need.
- I have already included Anytown Theatre in my Will.
- I am not currently considering supporting Anytown Theatre in my Will.

# What channels can you use to promote your legacy message?

- ⊗ Legacy pack?
- ⊗ Website?
- ⊗ Newsletters?
- ⊗ Exhibition guides?
- ⊗ BTS Tours/Open Days?
- ⊗ Talks?
- ⊗ Direct Mailing?
- ⊗ Email?
- ⊗ On site? (Signage? Screens?)
- ⊗ Face-to-face?
- ⊗ Meetings/visits?
- ⊗ Phone calls?
- ⊗ Events?
- ⊗ Free Will-writing?



Bookmarks asking people to consider leaving a gift in their Will to The Courtyard.  
© Kie Cummings



**ETO's spring season is full of stories about the incredible lengths people will go to in order to protect the things they love. Here we speak to Chris Ball about his own extraordinary act of generosity to support ETO:**

To describe ETO supporter Chris Ball as a music lover is something of an understatement. For him, music is a passion that has brought him enormous pleasure throughout his life – so much so that he has pledged to continue supporting the development of new singing talent when he will not be around to enjoy the results himself. Chris has updated his Will to leave a legacy to English Touring Opera.

Describing his motivation for leaving a legacy, Chris says “This is a way for me to invest in the future of a profession that has given me so much pleasure for the last 40 years.

Chris was one of the first people to leave a legacy to ETO. Since then, 10 other people have informed us of their wish to leave a gift to ETO, and there may be many more we do not know about. Some have left gifts to support our productions, while others are keen to help our education work to inspire a new generation of opera fans.

Relatable  
motivation

It's possible!

Life story

Social  
norming

Explaining the importance of legacies to ETO, James Conway says “Once you have looked after your loved ones, leaving a gift in your Will is a fantastic way to ensure that future generations continue to get as much enjoyment from ETO’s work as you do. Leaving a legacy is an incredible thing to do and we want to make sure your generosity and forward-thinking is properly acknowledged, and that your support is remembered for a long time to come.”

For Chris, the important thing is the impact his gift will have on many young singers. “You might think that there’s nothing in it for me, but that’s not true. It gives me enormous pleasure to think that, long after I’m gone, my legacy will play an important role in the work ETO does. To know that there will be performances taking place in the future, with singers taking part who have had my support at some stage in their career, is a wonderfully life-affirming thought.”

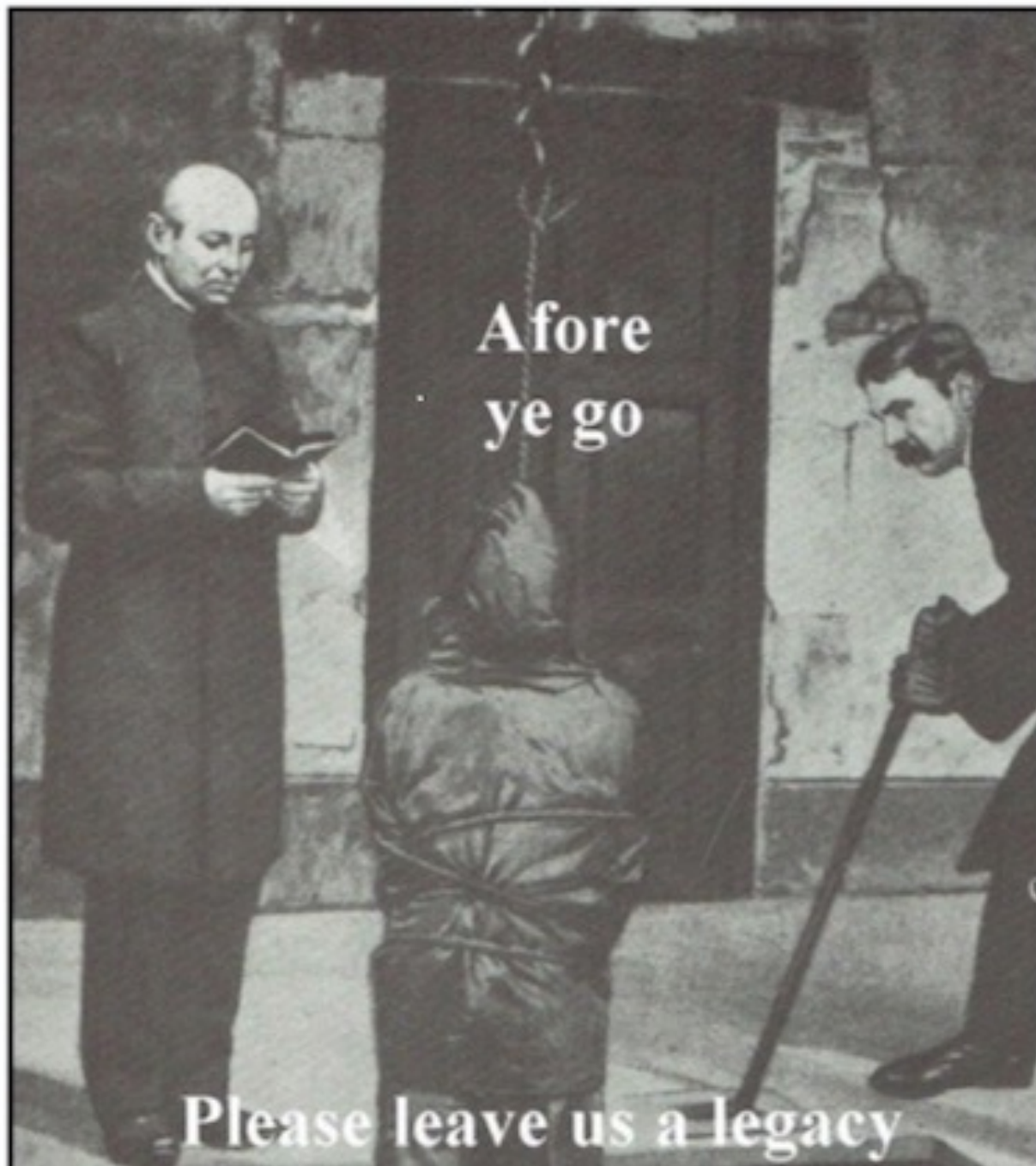
If you would like to learn more about leaving a gift in your Will, or to discuss how your legacy could support ETO, please contact...

Family first

Remembered

Impact

Positive act



Be noticed!

Be  
remembered!

Be sensitive to  
your audience!



What else do  
you need?



# What else do you need?

- ④ Legacy webpage
- ④ Legacy brochure?
- ④ "How to" guide?
- ④ Legacy mailings?
- ④ Legacy events?
- ④ Paid-for promotion?

# Things to consider including on your webpage and brochure

- ⊗ Charity name, number and address
- ⊗ Legacy proposition — bring to life!
- ⊗ Showing impact legacy gifts have
- ⊗ Contact details for enquirers and executors
- ⊗ Stories from other legators
- ⊗ Info about leaving specific legacies
- ⊗ FAQs?
- ⊗ Example wording?
- ⊗ “How to” guide or links to other sources of information?

- 1. Who can I talk to about making a will and leaving a gift to the National Trust?
- 2. How do I make a will?
- 3. What is the National Trust's registered charity number and details that need to be included in a will?
- 4. Can I choose what the gift in my will is spent on?
- 5. How can I make sure my gift maintains its value over time?
- 6. Can I find out what the National Trust spends gifts in wills income on?
- 7. Can I make the National Trust one of my executors?
- 8. I am an executor, where do I send the legacy payment?
- 9. What can I expect from the National Trust when I make a gift in my will?
- You might also be interested in

# Do we need a brochure?

## Advantages:

- ⊗ Some people prefer hard copy print
- ⊗ People hold on to them — helps to remain top of mind
- ⊗ Getting people to request copies is a way to get people to tell you they're interested
- ⊗ Hard copies on site continue to drip feed that legacies are an option

## Disadvantages:

- ⊗ Cost
- ⊗ Can become out-of-date and need updating
- ⊗ Need to be careful about giving legal or financial advice

# Tips for a successful legacy mailing

- ④ Consider linking to external events
  - ④ Remember A Charity, Free Wills Month etc
- ④ Consider the signatory – who has credibility with your target audience?
- ④ Consider the reader – font, design, accessibility
- ④ Consider including a response device
  - ④ Make it easy to respond
- ④ Consider what else you can offer
  - ④ Free Will writing event?

# Don't forget your Old friends!





Step 4:

Working with  
advisors and  
partners

# How could your organisation partner with advisors?



- ④ Free/discounted Will writing sessions?
- ④ Estate planning talks at your venue?
- ④ Display your legacy material?



# Other Will-writing opportunities

## National Free Wills Network

- ⊗ National network of solicitors and law firms who can write simple Wills for your supporters
- ⊗ Charity pays for the Will
- ⊗ 75% of Wills written include a gift to the referring charity

# Other Will-writing opportunities

## Free Wills Month

- ⊗ Available to people aged 55+
- ⊗ Typically March and October
- ⊗ Officially limited number of large charities involved
- ⊗ Unofficially, some participating firms will support local causes

# A simpler way to write your will.

For just £90 for a single Will and £120 for a couples Will, you can create your own legally binding will online with Kwil today.

It takes just 30 minutes and you pay nothing until you're happy to print and sign.

Create my will

Watch our TV Ad



The UK's top rated online will writing service.

For help creating a will during the COVID 19 epidemic please visit our dedicated guidance page.

bequeathed  
free wills, valuable advice

Guidance Contact Us My will Login



## Free wills from us

Valuable advice from expert solicitors

START YOUR WILL

Jonathan from Bequeathed

Hello, welcome to Bequeathed. To make your will for free just click "start your will". If you have any questions or need advice please just ask.

Write a reply...

### OVERVIEW

#### About The Goodwill Partnership

The Goodwill Partnership is the largest distributor of home-visit solicitor-provided Wills in England and Wales. We guarantee the lowest price for a home-visit Will which is checked and provided direct to you by a panel firm of solicitors who can also provide legal advice and storage of your signed Will.

The process of making your Will is made extremely simple. There are no visits to the solicitor; our trained counsellor comes to your home to take your Will instructions at a time convenient to you, whether daytime, evenings or weekends.

We charge a low fixed price, however detailed your Will, wherever you live, with no hidden costs or upsell of any other products. Our home-visit service is free of charge and we also provide a small discount on a second Will for your spouse or partner.

Welcare Guardian, the administration company behind The Goodwill Partnership, has been proud to offer an outstanding ethical service, providing great savings to clients, since 1993.

Farewill Wills Probate Cremation About us Blog Log in

## The simpler way to deal with death

Write my will → Apply for probate → Arrange a cremation →



Helping arts, culture and heritage organisations fundraise with confidence

# Other Will-writing opportunities

Online platforms — Bequeathed, FareWill etc

- ⊗ Bequeathed — charge charities £2,850+VAT per year. No additional cost per Will
- ⊗ FareWill — charge for packages, starting from 25 Wills. Claim that 24% contain legacies (which they claim is 2x industry standard)



## Step 5:

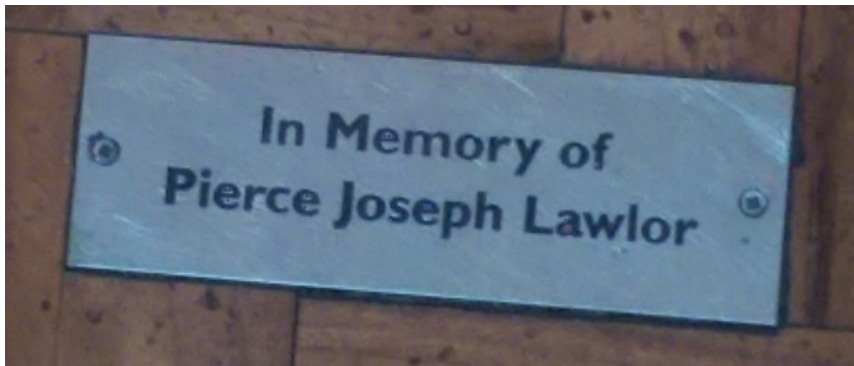
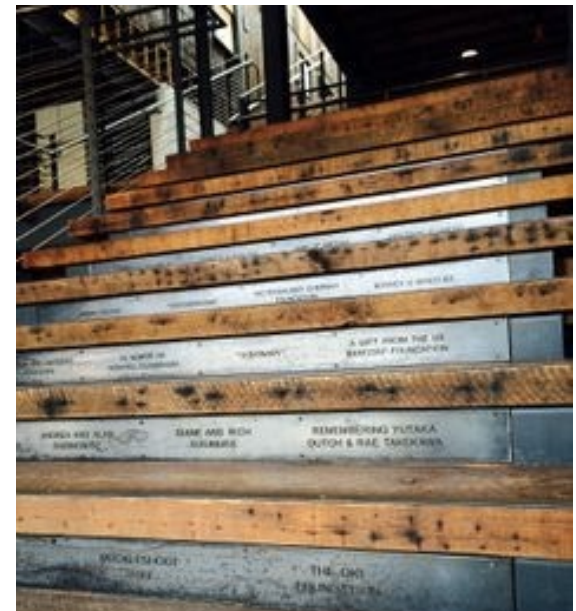
Decide how you  
will thank and  
recognise  
legacy donors



In 1934 Glyndebourne was founded through the generosity and vision of Audrey Mildmay and John Christie. The international festival it has become today is a credit to their vision: *'Not the best we can do but the best that can be done anywhere'*.

To honour their legacy, we have created the **John Christie Society** to recognise and thank generous and forward-thinking individuals who are leaving Glyndebourne a gift in their will.

John Christie Society members are recognised in the Festival Programme Book and have the opportunity to become more involved with Glyndebourne.

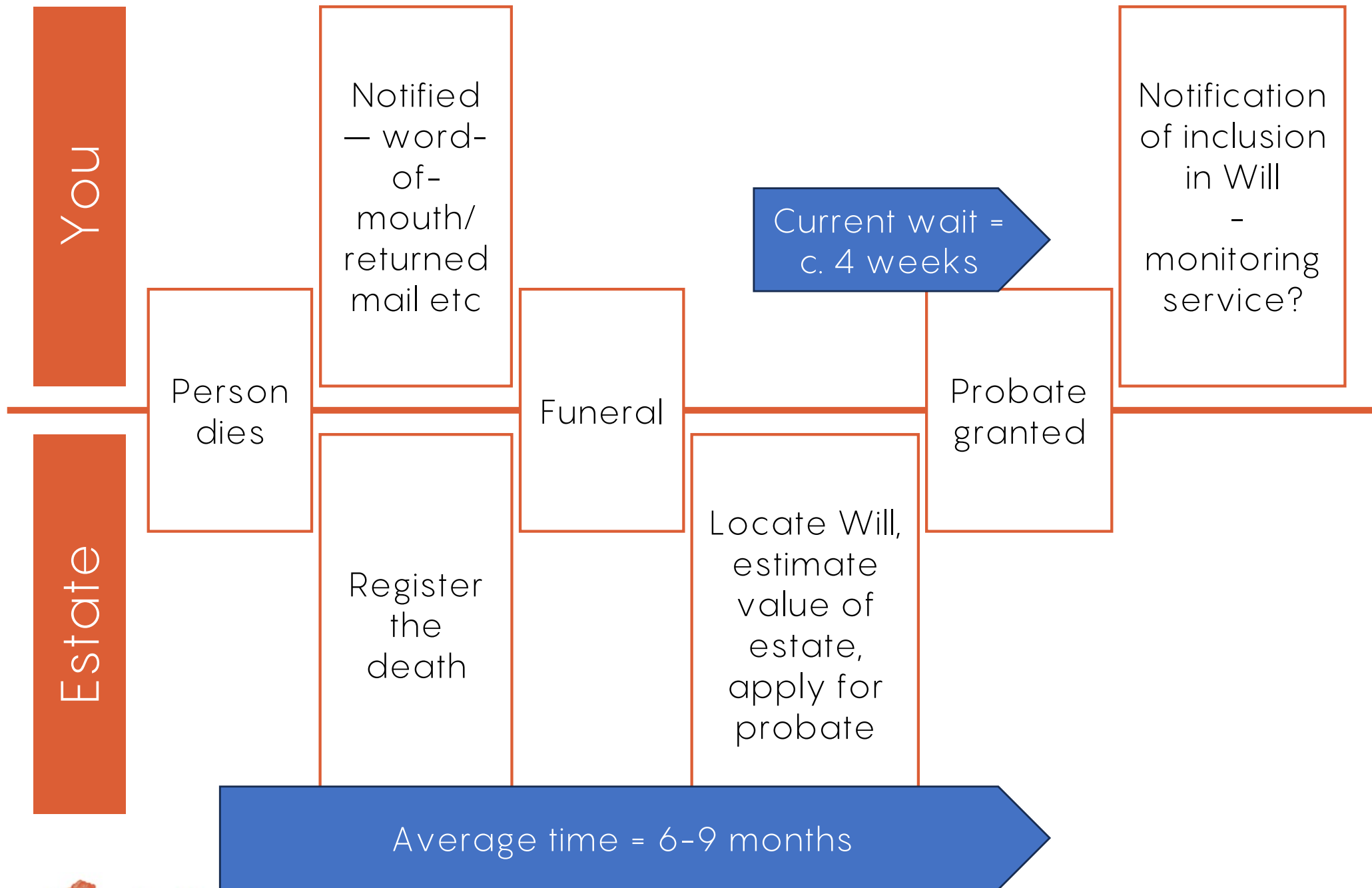


*helping arts, culture and heritage organisations  
fundraise with confidence*



Someone's  
died.  
What next?





You

If pecuniary...

Receive gift

Estate

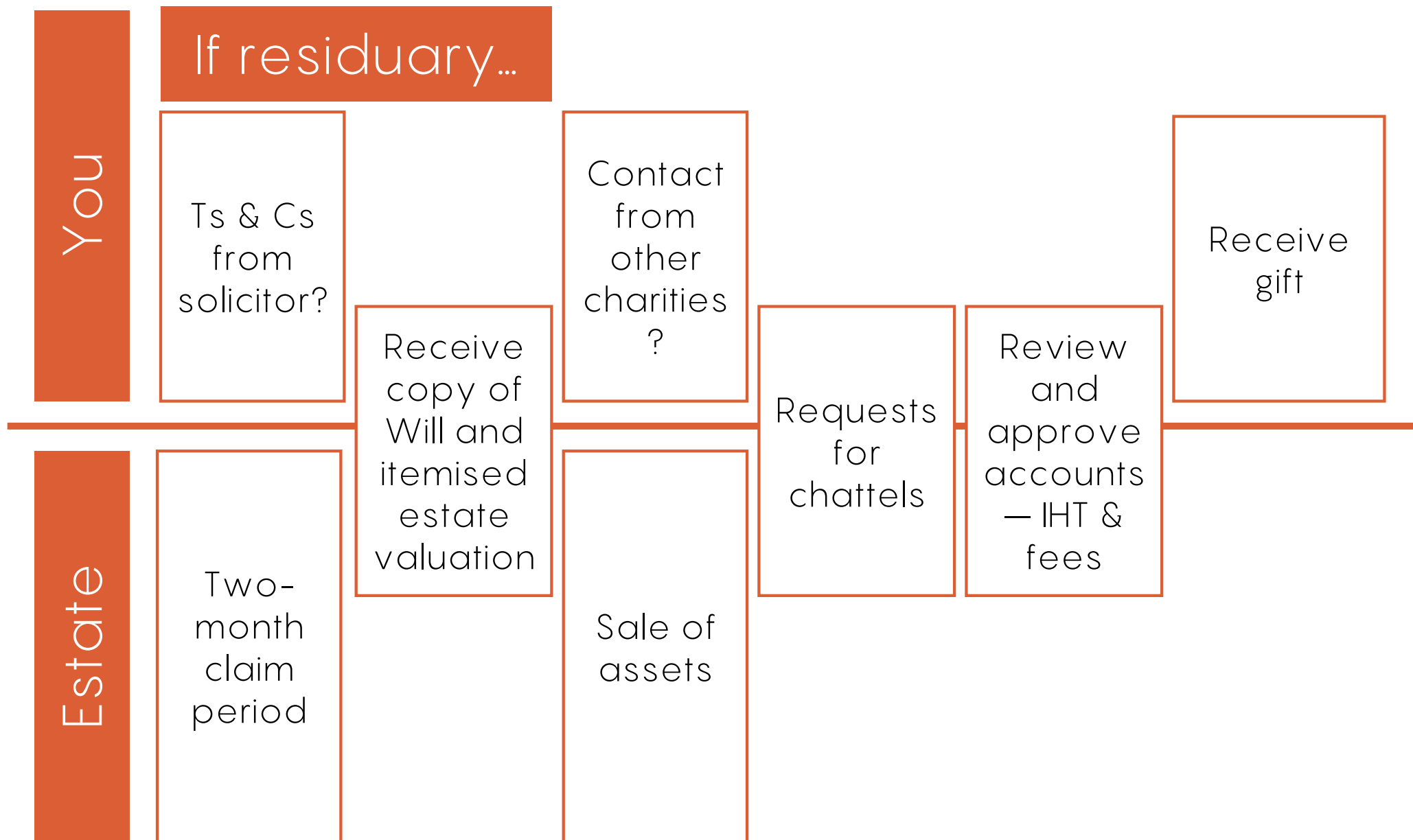
Two-month claim period

Sell assets?



**APOLLO**  
FUNDRAISING

*Helping arts, culture and heritage organisations  
fundraise with confidence*



# Other Sources of Information

The logo consists of three overlapping yellow circles. The text is centered within the circles.

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

[rememberacharity.org.uk/](http://rememberacharity.org.uk/)

The logo features the text 'Smee & Ford' in a large, red, serif font. A large, light grey ampersand is positioned behind the text. Below the main text, the words 'Wilmington Insight' are written in a smaller, red, sans-serif font.

**Smee & Ford**  
Wilmington Insight

<https://smeeandford.com/>

The logo includes the text 'Legacy Foresight' in a bold, black, sans-serif font. To the right of the text is a circular icon containing a stylized white wave or leaf shape on a dark blue background.

**Legacy  
Foresight**

[www.legacyfutures.com/services/legacy-foresight/](http://www.legacyfutures.com/services/legacy-foresight/)

The logo features a stylized red profile of a woman's head on the left. To its right, the word 'APOLLO' is written in a large, red, serif font, and 'FUNDRAISING' is written in a smaller, red, sans-serif font below it.

**APOLLO**  
FUNDRAISING

*Helping arts, culture and heritage organisations  
fundraise with confidence*

# David Burgess

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