



Introduction to Legacies

Agenda

- **What is a legacy?**
 - How many people write a Will / include a legacy gift
 - Basics of a Will
 - Reasons people make a Will (family, health, wealth)
 - Barriers to Will making
 - Types of gifts / average gift values
 - Terminology / language
- **Understanding the legacy market**
 - Legacy income trends
 - Baby boomers
 - Fastest growing cause areas
 - Opportunities / growth
 - Free Will service
- **Breakout groups (if applicable)**
 - PESTLE – list the factors that could impact on legacy giving (house/share prices, care costs, IHT etc) and feedback to the group
- **Who leaves a legacy and why?**
 - Average legator profile (age, gender, wealth, children etc)
 - The legacy journey

- Motivations / barriers to legacy giving
- Donor attitudes
- Key messages to convey in a legacy proposition (impact, why you need the gift, future focus etc)

- **Interactive session**
 - Video examples (examples of looking backwards/forwards) – how do motivations translate into practice
 - Existing charity websites - how are they using motivations in their messaging

- **How charities promote legacies**
 - The importance of drip feeding the message
 - Legacy materials
 - Types of marketing channels (DM, website, newsletter, TV adverts, telemarketing)
 - Digital (social media)
 - Imagery
 - Diversity / equality

- **Introduction to the laws and rules around legacies**

- **Signposting to helpful resources and where to find more information.**