

Introduction to Legacies, delivered by Legacy Futures

Agenda

10 mins	Introduction	- Introductions and agenda
20 mins	What is a legacy?	<ul style="list-style-type: none"> - 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
20 mins	Understanding the legacy market	<ul style="list-style-type: none"> - Legacy income trends - Baby boomers - Fastest growing cause areas - Covid-19 (more people planning for their death) - Opportunities / growth
25 mins	Breakout groups	- PESTLE – list the factors that could impact on legacy giving (house/share prices, care costs, IHT etc) and feedback to the group
10 mins	Break	
20 mins	Who leaves a legacy and why?	<ul style="list-style-type: none"> - 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)
25 mins	Interactive session	<ul style="list-style-type: none"> - Video examples (examples of looking backwards/forwards) – how do motivations translate into practice - Explore existing charity websites - how are they using motivations in their messaging
25 mins	How charities promote legacies	<ul style="list-style-type: none"> - 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
10 mins	Break	
25 mins	Basic introduction to the laws and rules around legacies	<ul style="list-style-type: none"> - An ethical approach to fundraising - Fundraising codes (Fundraising Regulator) - Institute of Fundraising - ILM
10 mins	Signposting to helpful resources and where to find more information	<ul style="list-style-type: none"> - ILM - CIOF special interest group - Legacy Link helpdesk - Fundraising Regulator - Remember a Charity - Smee & Ford - Legacy Foresight - Legacy Link helpdesk