Stronger Together

Strategic Priorities: 2026-2030

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

A CLEAR VISION

Our vision is a future where everyone across the UK is inspired and empowered to leave the world better and stronger by remembering the charities they care about in their Will.

In doing so, we will create a more sustainable and resilient future for charities, communities and beneficiaries, transforming lives for future generations.

Photo credit: Peter Kindersley, Centre for Ageing Better

OUR MISSION AND VALUES

Remember A Charity is a consortium of 200 charities and partners working together to grow legacy giving and normalise this vital income stream across the UK.

Through consumer campaigns, partnerships, lobbying, shared insights and practical tools, Remember A Charity achieves impact that no single charity could achieve alone; making legacy giving a social norm.

Our mission:

To grow legacy giving, raising vital long-term income for charities and sustaining charitable services across the UK.

Our values:

We pride ourselves on being ambitious in our drive for change, while always being inclusive, honest, respectful, and accountable for our actions.

INTRODUCTION FROM OUR CHAIR

For over 25 years, Remember A Charity has brought together charities and a wide array of partners with a shared mission of inspiring more people across the UK to leave a charitable gift in their Will.

At the heart of our approach is the conviction that legacy giving is one of the most meaningful and vital ways that people can make a lasting difference to the causes they care about, securing crucial funding and strengthening the resilience of charities and communities. This remains as true today as it was the day we were formed.

Legacy income has never been more valued or more needed than it is now. While it's true that some exceptional gifts can be utterly transformative for a charity, it's the steady flow of donations over time that is sustaining charitable services for an increasing number of charities and strengthening communities for generations to come.

Through high profile campaigns, advocacy, strategic partnerships and by equipping and empowering our members, this collective approach normalises the concept of leaving a charitable gift in a Will, strengthening the UK legacy environment. So much so, that despite the challenges of the current economic landscape, legacy giving is thriving and more people are choosing to remember a charity in their Will than ever before.

Still, the potential remains vast, with almost 2 in 5 charity supporters who haven't yet written a Will saying they are open to leaving a charitable gift.[1] We know there is significant scope to increase both the proportion of people giving in this way and the value of gifts, particularly from larger estates.

By working collaboratively and doubling down on those activities which we know to be crucial in driving change – from professional adviser engagement and strategic partnerships through to inspirational consumer campaigns – we aim to bridge that gap and accelerate legacy growth.

Here, we set out Remember A Charity's strategic priorities for the next five years, sharing our future vision and an aspirational goal that, by galvanising the sector, stakeholders and our advisory network, we aim to treble annual legacy income by 2050.

With the intergenerational wealth transfer from Baby Boomers now in motion, the coming years are an exceptional opportunity to draw together and accelerate legacy growth, raising vital core funding and sustaining charitable services for the long term.

Anaish Yilma-Parmar, Chair of Remember A Charity

Find out how you can join or support the movement at: rememberacharity.org.uk

[1] OKO / Remember A Charity, Stages of Change Report 2025

OUR STRATEGIC PRIORITIES FOR 2026-2030

To accelerate legacy growth, we have set four key strategic priorities and some ambitious goals for growth between now and 2030. They are:

Inspiring the UK public to leave a charitable legacy

We will increase the proportion of supporters aged 40+ who have included a gift to charity in their Will from 1 in 5 (21%) to 1 in 4 (24%), through national advertising and PR campaigns, partner activity and targeted digital outreach, measured via annual tracking studies.

Embedding legacy giving across Will-writing and estate planning

We will grow our network of legal firms, estate planners, and financial advisers, integrating legacy giving into their Will-writing processes, and provide Continual Professional Development (CPD) training for legal and financial professionals, with follow-up surveys to measure adoption and impact. 80% of solicitors and Will-writers will always or sometimes raise the charitable option with clients when providing advice on estate planning.

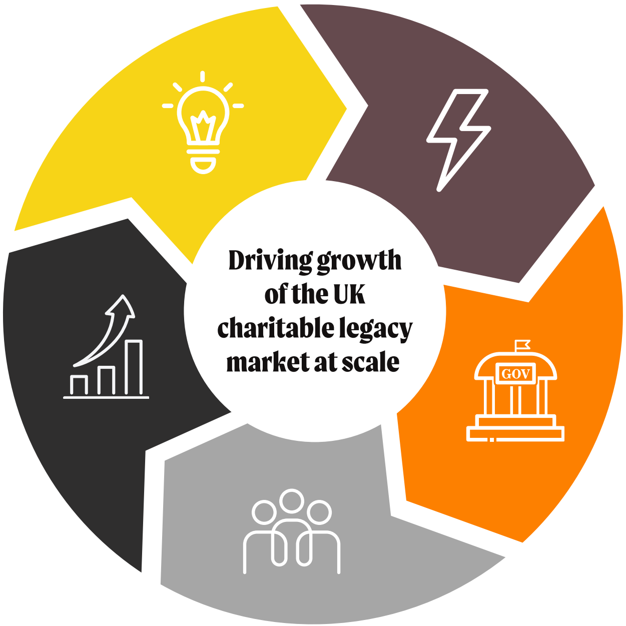
Influencing government and decision-makers to protect and nurture the future of charitable legacies

We will secure the policy commitments needed from government, MPs or influential regulatory bodies to protect and enhance the legacy environment, through coordinated advocacy, briefings, and stakeholder engagement. We will ensure members are satisfied with our representation and impact.

Equipping and enabling our members to maximise their legacy fundraising

We will grow member engagement, with 95% of our members having accessed our legacy fundraising training, downloaded one of our resources and/or attended our events. We will maintain a membership of close to 200 charities.

HOW WE GROW LEGACY GIVING



Inspiring the public

Through high profile, bold consumer campaigns, we build public understanding and inspire action – making legacy giving easy, accessible, social and timely. This includes Remember A Charity Week, a peak moment to maximise our impact and equip member charities to make the legacy message their own.

Normalising legacy giving in Wills and financial planning

Guided by behavioural insights, we work with solicitor firms, Will-writers and wealth advisers across the UK to integrate legacy giving in estate planning. Our 'nudges' change the norm – securing charitable prompts in Will-writing software, online platforms and across our advisory networks.

Voice of influence

A strong representative voice for our members, we engage with policymakers, regulators, stakeholders, partners and media to nurture and protect the legacy environment – whether that's lobbying for enhanced fiscal incentives, tackling delays at probate, influencing future legislation on Wills or best practice for legacy fundraising.

Maximising impact through collaboration

We support, empower and equip our members, professional advisers, partners, government and others, working collectively to accelerate our impact and drive up legacy growth.

Insight & best practice for legacy fundraising

Carrying out market research, we share exclusive insights, practical tips and best practice with members to inform & strengthen legacy fundraising.

WHAT WE WILL DO TO ACCELERATE GROWTH

As we look to the future, we have a powerful opportunity to build on the collective strength of our members, our professional adviser network and partners. By doubling down on the areas that can deliver the greatest impact and taking an evidence-based approach, we aim to accelerate legacy growth and maximise our impact. We will:

- **Harness the power of the collective**

  Using a strong, sector-wide voice, we will influence policy, best practice, shape systems, and drive the changes that individual organisations cannot achieve alone.

- **Enable intentional and confident giving**

  Inspiring the public to give meaningfully through engaging, informative campaigns and by providing clear guidance at key decision points, supported by behavioural insights and charitable prompts embedded within the estate planning journey.

- **Increase our focus on growing legacy values, as well as volume**

  Placing a greater emphasis on high net worth individuals - those with the greatest capacity to give, working with professional advisers and members to increase the number of large and percentage based gifts.

- **Maximise our flagship activation moment**

  Retaining the annual Remember A Charity Week as a key opportunity to mobilise partners, members, advisers, influencers and others, creating national visibility and prompting timely action on legacies.

INSPIRING THE PUBLIC TO LEAVE A LEGACY

Although 1 in 5 charity supporters aged 40+ have included a gift in their Will, there's greater scope for growth. Almost 2 in 5 of those who haven't yet written their Will say they are open to leaving a charitable gift.[2]

We aim to bridge that gap, making legacy giving a mainstream, inclusive and timely consideration for everyone, particularly at moments of planning and transition.

In normalising giving from a Will, we will create new sustainable income pipelines for charities and community-based organisations across the UK, expand the pool of legacy pledgers and strengthen the sector's resilience for the years ahead.

Working collaboratively, we will drive up legacy income with an increased focus on legacy values as well as volume.

[2] OKO / Remember A Charity, Stages of Change Report 2025

Photo credit: Marc Najera

WHAT WE WILL DO TO INSPIRE THE PUBLIC TO GIVE

- **Always-on digital-first strategy –** Storytelling to convey the impact of gifts in Wills all year round, connecting with our target audience of charity-minded people at key life stages. Developing compelling digital journeys so that those researching Wills find clear, trustworthy routes to action, building engagement and growing legacy consideration.
- **Bold campaigns at peak moments –** Inspiring and impactful advertising and PR campaigns during peak moments, including Remember A Charity Week. Activating our professional adviser network, partners and influencers to extend reach and engagement. Campaigns will reflect the breadth and diversity of the UK public.
- **Growing legacy values –** Increased focus on legacy values, deepening insight into the high net worth market, promotion of residuary giving, and engaging with advisers, financial planners and members to accelerate giving amongst those with wealth.
- **Strategic partnerships –** Collaborating with professional advisers, Will-writing platforms and software providers, media and partners to embed legacy content and prompts at natural decision points along the charitable Will-writing pathway.
- **Galvanising members –** Equipping members with assets and resources to communicate their legacy message with confidence, amplifying member stories and pledger journeys on our digital channels.

HOW WE WILL MEASURE SUCCESS

- **Public mindset and action:** Through our annual consumer benchmarking study, we will track legacy giving behaviour and attitudes.
- **Market indicators:** Working with sector partners, we will monitor the proportion of Wills at probate that include a charitable gift and legacy values.
- **High value legacies:** We will measure the average gift by estate size and proportion of estate donated.
- **Campaign reach and resonance:** Measuring our reach through PR, advertising and social, we will aim to further increase Remember A Charity website visits and engagement.

EMBEDDING LEGACY GIVING ACROSS WILL-WRITING AND ESTATE PLANNING

Over the years, our behavioural insights studies have demonstrated the key role professional advisers play in growing legacy giving. From our solicitor trials with the Cabinet Office Behavioural Insights Team in 2013, which showed that people are twice as likely to include a charity when a solicitor raises the topic during Will-writing, to today's OKO research, which underlines that the reason many people haven't included a charitable gift is simply because they didn't think of it at the time.

Our goal is to embed legacy giving across estate planning and digital platforms, ensuring everyone understands the option and that it is front of mind during Will-writing and at key life stages.

Two thirds of charity supporters with a Will use a solicitor to write it, making legal advisers a key part of our strategy. And with half of charity supporters saying they have sought financial advice, we will engage with a wider network of trusted advisers and financial planners as influential legacy advocates – from tax planning and retirement professionals to wealth advisers.[3]

[3] OKO / Remember A Charity, Stages of Change Report 2025

Photo credit: Centre for Ageing Better

WHAT WE WILL DO TO EMBED LEGACIES IN ESTATE PLANNING

- **Integrating legacies into estate planning practice –** Collaborate with industry bodies and advisory firms, solicitors, Will-writers and financial advisers to integrate charitable prompts into advice and digital tools, focusing on the top estate planning and advisory firms; those who drive the highest volume and value of estates.
- **Professional standards and training –** Provide Continuous Professional Development (CPD) and practical resources for legal & financial professionals, with digital badges on completion and follow-up surveys to measure impact. Co-design best practice guidance with practitioners and industry bodies.
- **Structured relationship pathways -** Strengthen our Campaign Supporter scheme, intensifying recruitment, stewardship and engagement amongst the largest and most influential advisory firms. Partner with key firms, industry bodies and influencers beyond the legal sector (financial, retirement, employee benefits and pensions).
- **Targeted marketing –** Increase visibility of our resources and schemes for advisers with targeted marketing, events, strategic partnerships, digital badges and our Legacy Friends Network.
- **Digital prompts –** Work with online Will platforms and software providers to embed timely, user-friendly charitable prompts and default pathways.

HOW WE WILL MEASURE SUCCESS

- **Adviser action:** Measuring the proportion of professional advisers who routinely raise charitable options during estate planning.
- **Behaviour change:** Tracking the proportion of professionally written Wills that include charitable gifts.
- **Online traction:** Monitoring the proportion of Wills with a charitable gift written through online Will-writers / software providers.
- **Partnerships:** Developing partnerships or Campaign Supporter relationships with the top estate planning firms (by volume and value of Wills), wealth advisers, and tax planners.
- **Impact of training:** Surveys to measure how likely advisers are to raise charitable legacies post training and confidence scores.
- **Campaign reach and resonance:** Measuring our media reach through legal and financial sector marketing and PR.

PROTECTING AND NURTURING THE CHARITABLE LEGACY ENVIRONMENT

The UK has one of the most favourable environments for legacies, where people have freedom of choice around how they allocate their estate and with generous tax incentives encouraging philanthropy. These factors are crucial for a flourishing legacy market.

Over the years, Remember A Charity has proven our ability to impact decision-makers at the highest level of government – developing policies that normalise and incentivise legacy giving, influencing tax policies and probate processes, best practice standards of fundraising, guidelines for Will-writing and more.

We will continue to use our collective voice, to work with the wider Chartered Institute of Fundraising and our partner bodies to represent the needs of our members and champion legacies, protecting and nurturing the UK's thriving legacy environment.

WHAT WE WILL DO TO PROTECT THE LEGACY ENVIRONMENT

- **Policy and regulation –** Engagement with government and regulators, advocating for policies that encourage legacy giving, protecting the tax incentives and legacy income flow, upholding high standards and consumer protections. Challenging regulations that could inhibit legacy growth.
- **Philanthropy agenda -** Align with the UK's philanthropy and social impact agenda to anchor legacies in this space, developing adviser training and lobbying for mechanisms that will promote legacy giving.
- **Issue management and trust –** Provide a knowledgeable and representative voice to champion legacy giving and protect trust in charities fundraising through legacies.
- **Strategic partnerships –** Work closely with government ministers and policymakers, sector partners, professional advisers and trade bodies in the legal and financial sectors to coordinate shared positions and rapid responses on relevant issues affecting legacies.
- **Advocacy from government –** Secure endorsements and commitments from government and influential stakeholders, engaging policy officials and ministers as advocates for charitable legacies.

HOW WE WILL MEASURE SUCCESS

- **Advocacy for legacies:** We will secure the policy commitments or public endorsements needed from government and/or regulatory bodies to protect and enhance the legacy environment.
- **Positive movement on key issues:** Continued progress on issues such as protecting the tax incentives, legacy giving from a pension, probate performance, Scottish notifications and Will-writing regulatory reforms.
- **Stakeholder survey:** Survey of members to monitor stakeholder satisfaction with representation through Remember A Charity.

EQUIPPING AND ENABLING MEMBERS TO MAXIMISE THEIR LEGACY INCOME

Across the consortium, members share the same singular goal of growing charitable legacies. By working collaboratively, we not only maximise efficiency – sharing insights, learnings and resources across the group, but we increase our impact, accelerating legacy market growth across the UK.

Working with and for our members, we have the power to transform public attitudes towards legacies, ensuring legacy fundraising is seen as a vital, valued income stream, and a deeply empowering way of supporting good causes.

We will deliver high quality member services - resources, peer learning, guidance, and data - helping members develop and sustain a successful legacy fundraising programme and protecting their market share. We will amplify members' legacy messaging to help them engage new audiences, growing legacy income sustainably.

WHAT WE WILL DO TO HELP MEMBERS GROW THEIR LEGACY INCOME

- **Amplification of members' legacy messaging –** Share member stories and case studies, demonstrating the importance of legacies and helping members reach new audiences.
- **Platform for legacy promotion –** Run consumer campaigns that serve as a platform for members' legacy fundraising, including Remember A Charity Week.
- **Equip members for legacy success –** Deliver promotional assets, training, research, events, guidance and resources, sharing the tools and insights to build legacy expertise and strengthen members' fundraising programmes. Sharing learning and testing innovations is a core part of our consortium model.
- **Raise standards –** Promote the highest standards of legacy fundraising, sharing regulatory updates and guidance, ensuring membership becomes synonymous with best practice, while encouraging the sharing of legacy knowledge across the sector more widely.
- **Strength of membership -** Maintain a strong membership base, listening to and acting on member feedback to ensure their needs are being met.

HOW WE WILL MEASURE SUCCESS

- **Member engagement:** We will grow member engagement, measuring the proportion of our members accessing our legacy fundraising training, downloading our resources and/or attending our events.
- **Sector representation:** Maintain a membership of close to 200 charities of a wide variety of causes and sizes, reflecting the diversity of the UK charity sector.
- **Member satisfaction:** Survey our members and carry out feedback calls, measuring their satisfaction with our achievements, services and the wider membership experience.

Photo credit: Peter Kindersley, Centre for Ageing Better

A BOLD LONG-TERM GOAL FOR COLLABORATION

Charitable legacies are inherently about the long-term; creating impact that extends far beyond present times.

While our strategic priorities set out a clear and ambitious programme of work for the next five years, we know that the real value of this will unfold over the decades that follow, strengthening the sector's sustainability and enabling charities to plan with greater confidence.

We believe that by galvanising the sector and building on our unique role as a collective movement, we can unlock even greater potential for legacy giving.

Working together, we can grow public engagement, address the barriers and activate a wide network of partners, encouraging more supporters to remember good causes in their Will.

Our aspiration is to drive up legacy giving, trebling annual income from charitable legacies to £14 billion by 2050.

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Together, we can create a future where everyone feels inspired and empowered to leave the world better and stronger by remembering the charities they care about in their Will.

WHY JOIN REMEMBER A CHARITY?

Reach and influence you can't achieve alone

- Consumer and professional adviser campaigns driving up legacy awareness, understanding and consideration
- Collective voice normalises legacy giving and grows trust across the UK

Practical tools to drive legacy success and upskill your fundraisers

- Promotion of your charity's legacy stories within high profile consumer campaigns
- Shared resources, messaging frameworks and campaign assets save time and cost
- Training, webinars and networking accelerates learning

Advocacy and policy that protects our collective interests

- Representation on sector-wide issues such as protecting tax-incentives and probate delays
- Normalisation of charitable Will-writing through partnerships with the legal and financial sector, and collaboration with government.

WHAT ARE THE MEMBER BENEFITS?

- ✓ Exclusive legacy market research and insights
- ✓ Representation in the consortium's lobbying activity to protect and enhance the national legacy environment
- ✓ Access to new audiences through Remember A Charity's website and participation in our national consumer campaigns
- ✓ Free on-demand legacy fundraising training, webinars and events
- ✓ Customisable legacy marketing assets, practical tips, guidance and resources to power your legacy fundraising programme
- ✓ Access to Remember A Charity's professional adviser network
- ✓ Discounted Will-writing services and other exclusive offers
- ✓ Thriving membership community, opportunities to exchange best practice and accelerate learning with your peers.

Find out how you can join or support the movement at: rememberacharity.org.uk

> We have a unique opportunity to significantly grow the legacy market over the next few years, providing opportunities for all charities to generate significantly more income. We will only do this effectively, however, by collaborating and working together. Remember A Charity is the best place to do this.

Craig Fordham, Director of Public Fundraising, Macmillan Cancer Support

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Remember A Charity

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