



# **Pass on something wonderful**



**Impact Report 2020**



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

**“Remember A Charity  
relies on the collective  
strength of its members  
to protect and grow the  
legacy sector, making gifts  
in Wills a social norm.”**

# Welcome from the Chair

**It goes without saying that 2020 was an incredibly difficult year that challenged us all as fundraisers and as individuals. But it was also the year that showed the importance and strength of collaboration.**



Reflecting on our 20th year of Remember A Charity, it was fantastic to see the consortium come together to share advice and support throughout the pandemic – it's a wonderful community we have.

Against the backdrop of Covid-19, Remember A Charity has continued to grow its membership and together we achieved positive outcomes on behalf of the sector to continue growing the market and making space for every charity to benefit.

Remember A Charity Week was our most successful ever, thanks in part to the timely return of the Wombles to help spread our message and inspire more of the public to leave a gift in their Will.

We were delighted to lead a legacy giving roundtable hosted by the Minister for Civil Society, Baroness Barran MBE, which brought together representatives from the Law Society, IFAs and the charity sector. Growing and broadening our partnerships amongst professional advisors is vital in helping us to normalise charitable gifts in Wills.

Will-writing itself has seen a huge uplift this year, with many turning to online providers to

ensure their affairs are in order. The pandemic has encouraged us all to pause and reflect on the things most important to us: family, friends, community and favourite causes.

The surge in demand has not been without its challenges however, and during the ongoing probate delays Remember A Charity has been there to ensure your voice is heard and the implications to your vital work are understood.

In 2020 while many fundraising channels and activities ceased, gifts in Wills – the largest source of voluntary income – sustained vital charitable services across the UK. Will-writing and legacies are more relevant than ever before, and this area of income will continue to grow. And it's the growth in pledges and promise of future gifts that is feeding the sector's hope for recovery.

Looking ahead, these turbulent times of uncertainty will continue, but we can find strength and support amongst our fellow fundraisers and be proud of what we can achieve together as a consortium.

I'd like to thank all our members, partners and the Chartered Institute of Fundraising for their hard work and continued commitment to the campaign during such tough times. Only by working together, collaborating with the legal sector, and using our collective power as a consortium can we achieve what no single charity can do alone: making gifts in Wills a social norm.

Allan Freeman

A handwritten signature in black ink, appearing to read 'Allan Freeman', with a long, sweeping horizontal line at the end.

Chair, Remember A Charity

# Strategic partnerships to drive behaviour change

## Ministerial roundtable marks 20 years of growing legacy giving

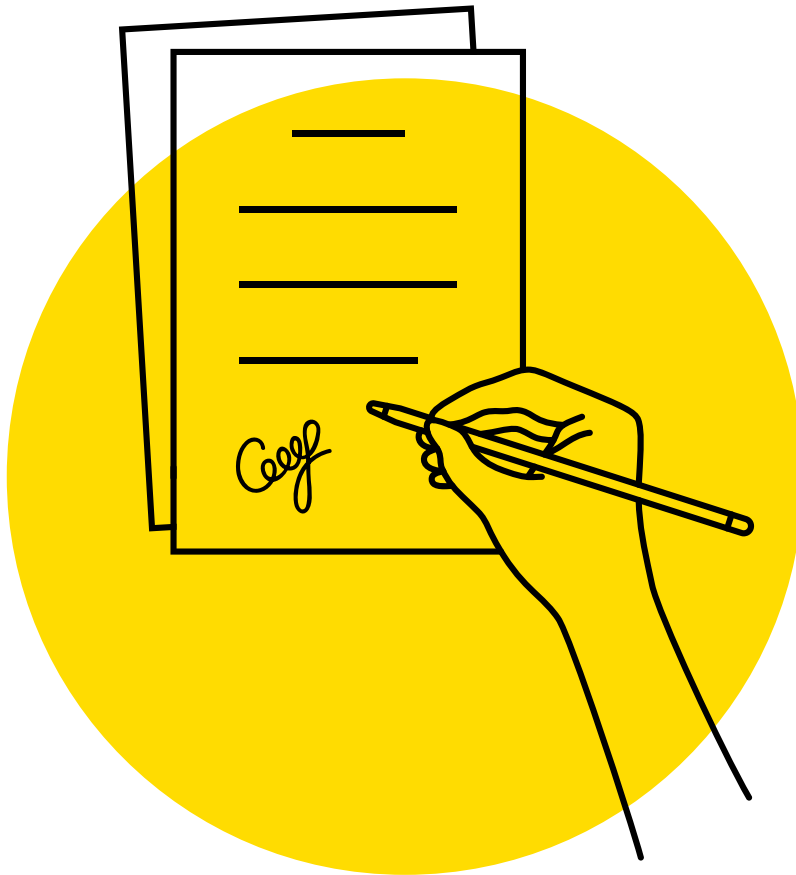
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To mark 20 years of Remember A Charity we were delighted to lead a legacy giving roundtable hosted by the Minister for Civil Society, Baroness Barran MBE. Attendees included representatives from the Law Society, the Personal Finance Society and the charity sector.

During the roundtable we discussed how the legal profession, Will writers, financial advisors, charities and government can best work together to give people the opportunity to leave a gift to charity in their Will and create a lasting legacy.

Events like these are vital in helping to raise the profile of legacy giving and the important role that professional advisors play. On your behalf, Remember A Charity encourages more charitable conversations between professional advisors and your supporters when writing their Wills.





## Will-writing Partnerships

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Remember A Charity believes that everyone should have a professionally drafted Will to ensure they can include everything they care about. This is why we value our relationship with our 1,200 solicitor and Will-writer Campaign Supporters as well as our long-standing partnership with Co-op Legal Services. We also recognise that consumers need choice and that we need to respond to the growing demand for online Wills.

This year we were delighted to extend our consumer offering by partnering with

Bequeathed. This partnership allows your supporters and wider consumer audiences to write a free Will online, whilst making them aware of the importance of professional legal advice. Those who have more complex estates, or simply want the added reassurance of legal advice, will be referred to participating Campaign Supporters.

This new partnership opens up valuable new opportunities to further engage our network of professional advisors, as well as providing another incentive to drive consumers to our website which only features our members.

# Supporting our members and the wider legacy sector

## Our first joint report: Strengthening Charities' Resilience with Legacies

We launched our first joint report with Legacy Foresight, the Institute of Legacy Management and Smee & Ford.

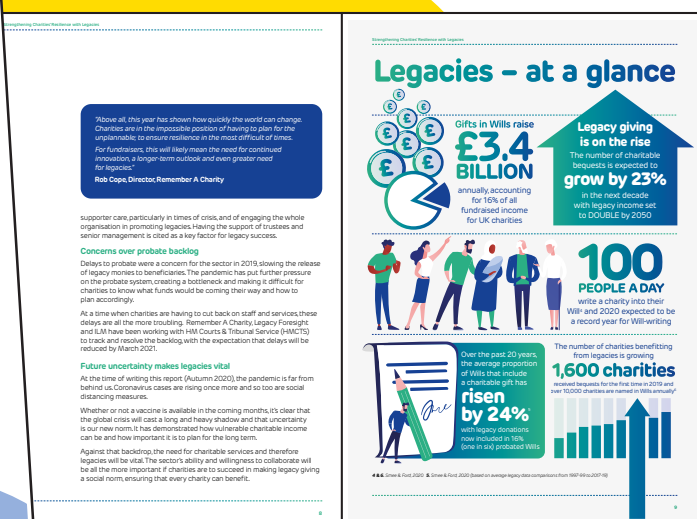
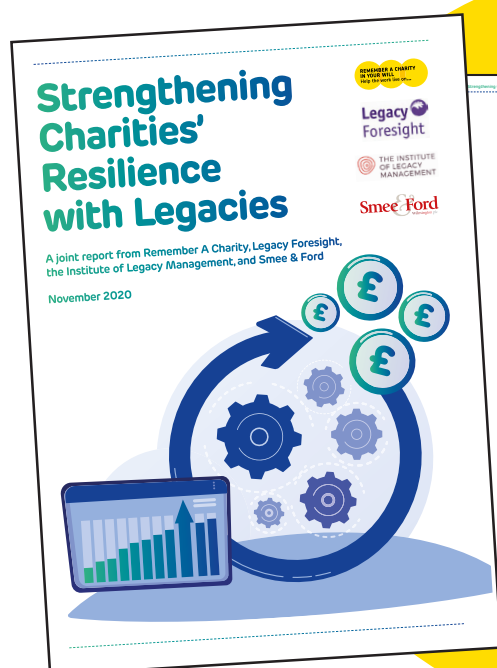
*Strengthening Charities' Resilience with Legacies* explores how legacies have provided greater resilience and stability during the pandemic. The report features interviews with experts from across the sector and includes recommendations on how charities can strengthen legacy fundraising during times of uncertainty.

Most importantly, the report urges charities to make the most of the estimated £40bn legacy income boom over the next 10 years.

Charities should act soon to benefit from this predicted growth, and this report can be used to communicate the importance of legacies within your organisation.

**Modelling from Legacy Foresight within the report reveals that decisions relating to more than £4.5bn-worth of income over the next decade will be made in the next five years.**

If a charity were to hold off on legacy marketing for just one year, they could miss out on the opportunity to influence decisions on more than £1bn of this income.





**“Remember A Charity membership has been invaluable throughout 2020. As the only member of my team not on furlough, they helped look after my mental health by keeping me connected to other legacy professionals.”**

Victoria Friar, Regional Legacy Manager  
(London & South East), Save The Children UK

## Supporting members through a challenging year

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In what was an extremely challenging year, our first priority was to support our members through times of uncertainty; providing regular communications and resources to help keep the legacy sector connected.

The usual face-to-face scheduled Members' Forums were replaced with webinars over Zoom, which made them more inclusive and accessible to those who may not normally be able to travel to London.

The Remember A Charity podcast brought together experts from the legacy sector to help answer questions and discuss key topics that are affecting legacy fundraisers during Covid-19. We had some brilliant guests offering their advice and expertise and the podcast received excellent feedback from members.

Throughout the year Remember A Charity worked closely with sector partners, including the Chartered Institute of Fundraising and ILM to represent your voice at a national level to government partners, ensuring your charity's concerns on key issues such as the probate backlog were addressed.



# Normalising charitable Will writing at key life stages

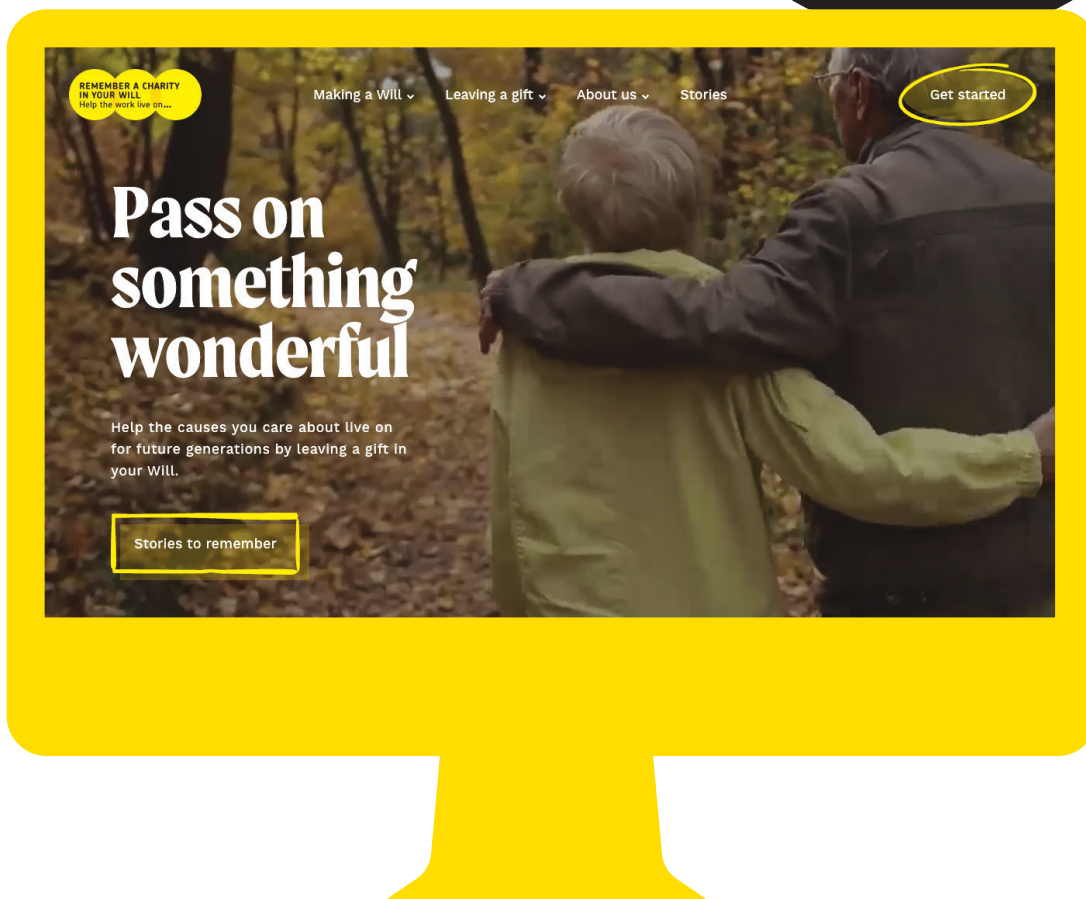
## Launching our new website

The new Remember A Charity website is part of our drive to reach more of the Will-writing public throughout the year. By making the site more consumer-focused we will inspire even more people to consider leaving a gift to charity.

The new website has already seen an 80% increase in visits from search engines which has translated to a rise in visits to our dedicated member charity pages. Unique pageviews have doubled since the site launched and average time on page has increased by 24%, demonstrating an improved user experience.

We have also made member stories more prominent on the website. These stories have received high levels of positive engagement on Facebook. In the last six months alone, they reached over 250,000 people and were shared and liked over 48,000 times.

**Our new website has already seen an 80% increase in search engine traffic from the Will-writing public.**







**Former Strictly head judge Len Goodman helped generate more than 226 pieces of press coverage including interviews on Good Morning Britain and BBC radio stations.**

## Passing on something wonderful

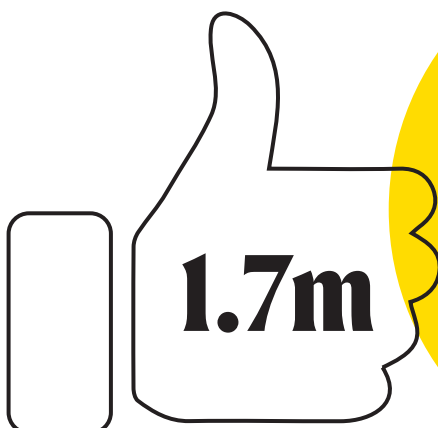
It was fantastic to see so many members getting behind Remember A Charity Week this year to celebrate the impact and importance of gifts in Wills. Whilst it's been an incredibly challenging year, the awareness week was one of our most successful yet.

Former Strictly head judge Len Goodman kick-started the Week, helping to generate more than 226 pieces of press coverage including interviews on Good Morning Britain and BBC radio stations. National and regional newspaper coverage generated a reach of 381m (up 37% on last year).

Remember A Charity's recently re-launched website saw over 55,000 visitors actively

searching for charities and solicitors during the campaign period (an increase of over 200% from last year). Many of these visits were driven by the launch of the social media campaign featuring the Wombles. Our creative campaign brought back everyone's favourite burrow-dwelling family, reminding the public to consider including a gift to charity in their Will, once loved ones are taken care of. The nostalgic yet timely animation was hugely successful, with the targeted media reaching 1.7m people on Facebook.

With a focus on providing a variety of flexible digital assets, members can continue to shout loud about legacies far beyond Remember A Charity Week.



**The Wombles campaign reached over 1.7m people through targeted Facebook ads and helped attract over 55,000 new visitors to our website**



# 20 years of Remember A Charity

2000



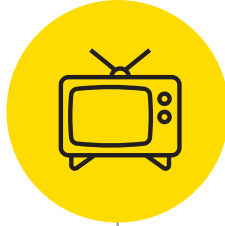
18 fundraising directors came together to grow the legacy market

2002



Legacy Promotion Campaign was launched

2005



First TV advertising campaign

2009



A social marketing campaign was launched

2010



Remember A Charity Week was launched

**“Our growth as a consortium has allowed us to grow the legacy market and provide more opportunities for our members.”**

2016



The campaign is endorsed by Government on social media

2017



Charities minister Tracey Crouch shows support for legacy giving, writing to over 8000 solicitors



Remember A Charity welcomes its 200th member

2018



Our directory of campaign supporters grows to over 1,300

2019



Proposed hike to probate fees scrapped after lobbying Government



The number of solicitors and Will writers mentioning charity during the Will-writing process reached an all-time high - 68% always or sometimes mentioning the option of legacies to their clients



Evidence provided by Remember A Charity resulted in the Office of Tax Simplification (OTS) recommending to retain the current 'critical' tax breaks for legacy giving, following a national review of inheritance tax (IHT)

2020



Most successful Remember A Charity Week to date, reaching millions via paid social and national press – driving 55,000 people to our website



Over the past 20 years the average proportion of Wills that include a charitable gift has risen by 24%, with 16% of probated Wills including a charitable gift



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

REMEMBER A CHARITY 13-15 CARTERET STREET LONDON SW1H 9DJ TEL: 020 7840 1030

Remember A Charity is part of the Chartered Institute of Fundraising, which is incorporated by Royal Charter (RC000910) and is a charity registered in England and Wales  
(No. 1188764) and Scotland (No. SC050060)