



PASS ON SOMETHING WONDERFUL



IMPACT REPORT 2019



**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

I've only been Chair for a few months but after reflecting on Remember A Charity's achievements over the last year, I can see how much of the team's work goes under the radar – sometimes even our member charities aren't aware of it. But often it's this vital work that makes the biggest difference.

FACING CHALLENGES TOGETHER: Last year was certainly challenging, but it led to closer collaboration across the charity and legal sectors, and government. Remember A Charity worked tirelessly behind the scenes with the Institute of Fundraising, NCVO, ILM, STEP and the Law Society to achieve some incredibly positive outcomes on behalf of member charities.

Most notably, lobbying the Ministry of Justice to scrap the proposed hike in probate fees, and the Office of Tax Simplification backing our recommendation to retain the current inheritance tax rate relief. Successes such as these are crucial for creating a favourable Will-writing environment.

EVIDENCE OF SHIFTING ATTITUDES: One of last year's most encouraging developments was the continued positive shift in attitudes amongst professional advisors. 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.

The importance of this cannot be overlooked – our previous research with the Behavioural Insights Team shows that when solicitors mention the charitable option to clients it doubles the number of charitable Wills written.

ACHIEVING POSITIVE CHANGE: We were happy to see continued growth in the legacy market, with public appetite for legacy giving continuing to rise. In our latest consumer tracking poll, 40% of respondents said they would be happy to leave a gift to charity in their Will, up from 35% in 2008.

Our 10th Remember A Charity Week was the most successful to date. The collective activity from our members, combined with national press coverage and a highly targeted social media campaign, resulted in the campaign reaching millions of the Will-writing public.

All of these drivers helped produce the most important result: a sustained increase in the number of people who have taken action to include a charitable gift in their Will (17% in 2019, up from 11% in 2010).

With potential changes to Will writing on the horizon, it's more important than ever to continue collaborating and building strategic partnerships so that we can reach new audiences – demonstrating the importance of gifts in Wills.

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

Allan Freeman



Chair, Remember A Charity

STRATEGIC PARTNERSHIPS TO DRIVE BEHAVIOUR CHANGE

INFLUENCING KEY DECISION MAKERS

After lobbying the Government to abandon plans for a new probate fee regime that would threaten legacy giving, we welcomed the announcement in autumn 2019 that the proposed changes were to be scrapped.

We worked closely with the Institute of Fundraising, NCVO and the Institute of Legacy Management to urge the Ministry of Justice to review the proposed changes. This close collaboration, with support from others such as STEP and the Law Society, helped to bring about the decision to scrap the proposed probate fee hike.

We will continue working closely with Government to ensure our members' voices are heard and that the legacy environment is protected. This includes ensuring that concerns about the prolonged delays to probate are addressed and members stay informed.



**PROPOSED HIKE
TO PROBATE FEES
SCRAPPED AFTER
LOBBYING
GOVERNMENT**


DRIVING CONVERSATION ABOUT CHARITABLE GIVING

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).

Charitable gifts in Wills are currently exempt from IHT (charged at 40%) and those who donate over 10% of their estate to charity benefit from a discounted rate of 36% across the remaining value of their estate. The review questioned whether the 10% incentive should be continued.

We presented a very strong case for keeping the rate of relief. Our evidence showed that the incentive encourages a charitable conversation between advisors and clients – raising overall giving levels. The final report from the OTS included references to our ongoing work with the legal sector, backing our recommendation to retain the current IHT incentive.

This decision was excellent news for the sector as the discounted IHT rate will continue to be a powerful incentive for gifts in Wills and an important conversation starter for solicitors and Will writers.



**IN THE NEXT FIVE YEARS,
MORE THAN 10,000 ESTATES WILL
LIKELY BENEFIT FROM THIS REDUCED
RATE OF TAX, GENERATING MILLIONS
IN LEGACY INCOME**

ENSURING A CONSISTENT APPROACH AMONG PROFESSIONAL ADVISORS

INCREASED LEVELS OF CHARITABLE CONVERSATIONS AMONG WILL-WRITING PROFESSIONALS

Attitudes amongst professional advisors towards discussing charitable giving continues to shift.

Our latest research in 2019 showed the proportion of solicitors and Will writers who always or sometimes discuss the option of leaving a charitable legacy with their clients has risen to an all-time high.

The study revealed that 68% of solicitors and Will writers always or sometimes mention legacy giving with clients, up from 58% in 2012. The percentage of those who never mention charitable gifts in Wills has also more than halved from 16% in 2012 to only 7% in 2019.

These results mean more of the Will-making public are having conversations about charitable legacy giving when they make their Wills.



KEEPING THE CONVERSATION GOING

Remember A Charity continued working closely with the legal sector to ensure a consistent approach to legacy giving conversations. We presented to hundreds of professional advisors and exhibited at 14 legal conferences around the country in 2019.

We placed adverts in all key legal trade publications throughout the year and promoted Remember A Charity Week amongst our network of 1,300 solicitors and Will writers, helping to build awareness and understanding within this group.

We partnered with Countrywide Trust & Tax, creating a new charitable giving message which was incorporated into their Will-writing software. The new legacy giving option will benefit up to 60,000 Wills a year, potentially generating millions in legacy income for charities.



NORMALISING CHARITABLE WILL WRITING AT KEY LIFE STAGES

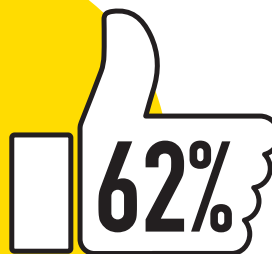
PASSING ON SOMETHING WONDERFUL

Celebrating the 10th Remember A Charity Week in September 2019, we brought together 200 charities to challenge common misconceptions around legacy giving.

Continuing the overarching theme encouraging charity supporters to 'pass on something wonderful', the Week reached millions of the Will-writing public on Facebook with a 70s-inspired series of films that used nostalgic humour. It achieved over 4 million impressions, with 32,000 new visitors to the Remember A Charity website which features only our members.

The Week was once again supported by former Strictly head judge Len Goodman who helped generate more than 150 pieces of national press coverage, including interviews with Phil and

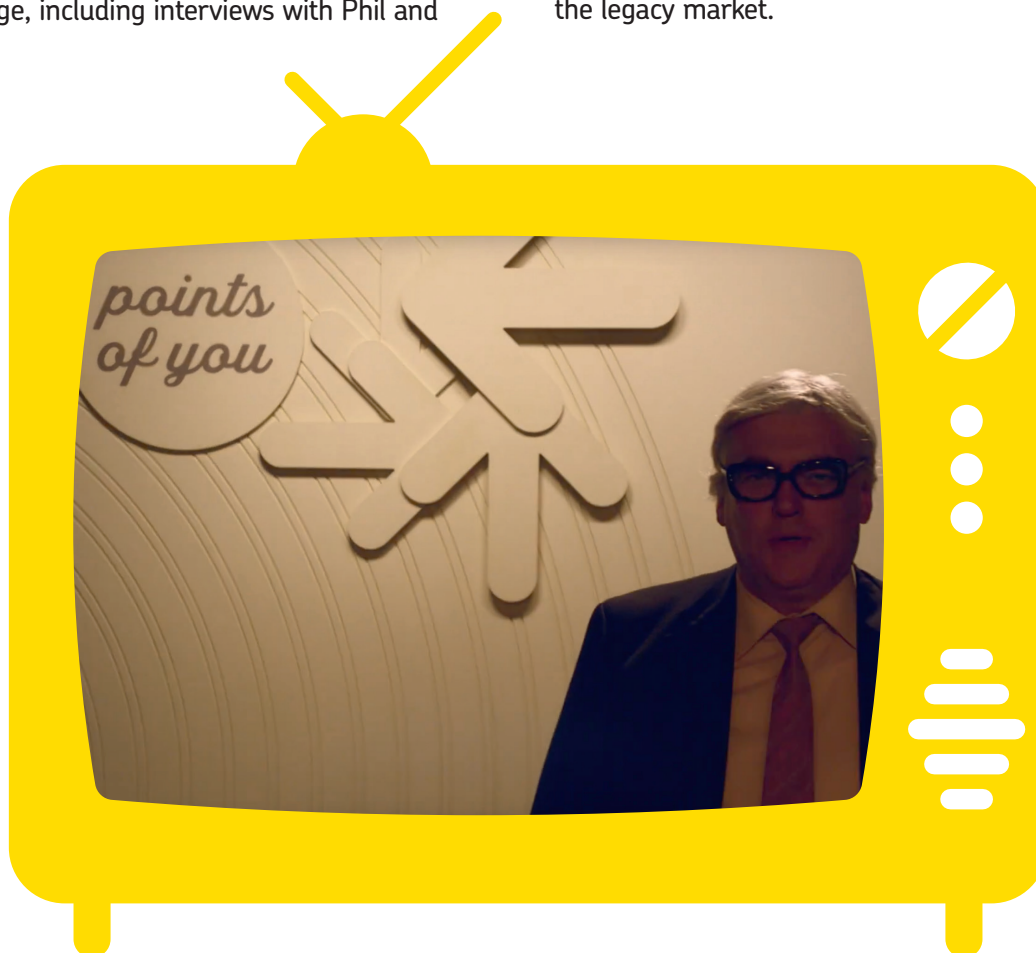
THE CAMPAIGN
REACHED 62% OF ALL
CHARITY-MINDED
PEOPLE AGED 55+
ON FACEBOOK



Holly on This Morning, on BBC radio stations, and widespread regional newspaper coverage.

Additionally, the Week received record levels of support from solicitors and Will writers who backed the campaign and shared their own insight to increase understanding of legacies.

Together, the consortium reached millions of the Will-writing public, raising awareness of gifts in Wills, helping to increase consideration and grow the legacy market.





THE SCOTSMAN

SCOTLAND'S NATIONAL NEWSPAPER

Charities earn £3 billion as more people leave a legacy

More people are leaving money to charities in their will, according to figures from the Co-op, which says that the number of gifts has risen by 53 per cent in a year. People left a total of £3 billion in their will last year, according to figures released at the start of Remember a Charity in your Will Week. Among the biggest winners from wills were Cancer

Research, which was left £181 million, the RNLI (£135 million), the Salvation Army (£63 million) and the RSPCA (£77 million). However, only six people Cope, "If even to go to enormous

Britons leave £3bn to charity in their wills

CARING Britons left around £3billion to charity in their wills last year, figures reveal.

Among the biggest beneficiaries were Cancer Research UK with £181million, the RNLI (£135million), British Heart Foundation (£83million) and the RSPCA (£77million). Remember A Charity Week starts today, and director Rob Cope said: 'Any gift - no matter how small - makes an enormous difference.'



Strictly veteran alters will for charity

Len Goodman is backing a campaign which encourages people to leave a gift in their wills to charity.

The former Strictly judge is supporting Remember A Week and said he has altered his own will to charitable gift. d: "Since last year the chance to meet the fantastic people hard for the charities that Remember supports. I've since my will to include a gift after my family taken care of."

RESEARCH INDICATES STEADY GROWTH IN LEGACY MARKET

More people than ever before are aware of the option of gifts in Wills, with 17% of the UK claiming to have already left a legacy.

Our 2019 annual consumer benchmarking survey also showed that the percentage of those who are unaware of legacy giving has fallen to 11%.

THE NUMBER OF PEOPLE UNAWARE OF LEGACY GIVING HAS FALLEN FROM 20% IN 2010 TO 11% IN 2019

Our focus remains to address the disconnect between 55+ ABC1s who are aware of legacy giving and those actively considering it.

The proportion of Wills going through probate that includes a charitable legacy has risen from 12.2% to 15.8% over the past decade, with more than 10,000 charities named in Wills annually, whilst legacy income now exceeds £3 billion – the largest ever reported.



The Telegraph

LEGACY INCOME
£3bn+

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

Remember A Charity is part of the Institute of Fundraising, a registered charity in England and Wales [No. 1079573] and in Scotland [No. SC038971]