

Professional Adviser Tracking Study:

The changing landscape for charitable Wills & estates, November 2026

Introduction

Charitable legacies have become increasingly popular with the giving public, now generating **£4.4 billion*** of vital funding for good causes annually across the UK. And yet, our consumer research shows that only half as many of those who wish to leave a gift in their Will have done so.

At Remember A Charity, we work to address this disconnect, helping to grow the charitable legacy market by raising awareness and increasing understanding amongst the public. We collaborate with solicitors, professional Will-writers, wealth advisers, charities, partners and government to grow charitable Will-writing.

Our research with the Behavioural Insights Team demonstrates what a crucial role professional advisers play in supporting philanthropy, showing that even the simplest reference to the option of leaving a charitable gift during Will-writing doubles the chances that a client will do so.

We offer free resources to support professional advisers in making clients aware of the charitable option. Find out more:



Solicitor & Will-writer resources

Wealth adviser resources

*The Legacy Giving Report 2026, Smee & Ford / Legacy Futures

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What this report covers

This report summarises the key findings of our **Professional Advisers Tracking Study 2026**, carried out by the independent research agency, Savanta. The study explores the views of solicitors, professional Will-Writers and financial advisers on charitable Will-writing, and the changing Inheritance Tax landscape.

Based on survey responses from 258 advisers, including 157 solicitors, 77 Will-writers and 24 financial advisers, this year's study draws comparisons with earlier iterations of the research, carried out since 2015. Previously, the research was conducted via telephone interview, while 2026 data was gathered through an online survey over a longer time period, from February to July 2026.

Acknowledgements:

Our thanks go to the following organisations, whose members and readers kindly contributed to this study: STEP, the Association of Lifetime Lawyers, the Institute of Professional Willwriters, the Society of Will Writers, Best Foundation, and Today's Wills and Probate.

Executive Summary

This report reveals a positive shift in the charitable legacy market, with professional advisers playing an increasingly important role in normalising gifts in Wills across the UK. Against the backdrop of a changing Inheritance Tax (IHT) landscape, it indicates that demand for estate planning advice is on the rise, and that this is creating new opportunities for advisers to discuss charitable giving with clients.

Encouragingly, almost nine in ten solicitors and Will-writers now proactively raise the option of leaving a charitable gift in a Will, with almost half saying they always do so. Tax incentives have become a key conversation starter, reflecting growing client interest in estate planning and tax-efficient giving, alongside philanthropic factors. The findings also suggest that clients are highly receptive to these discussions, helping to dispel concerns that charitable gifts – a key and familiar component of the modern estate planning world - may be a sensitive or unwelcome topic for clients.

Crucially, charitable gifts are becoming more commonplace in professionally written Wills. Advisers report that more than a quarter of the Wills they prepare now include a charitable gift, representing substantial growth over the past decade. This trend aligns with wider evidence of increasing public openness to legacy giving and underlines the influential role that professional advisers can play in helping people translate charitable intentions into action.

The study highlights a growing opportunity for charities, advisers and policymakers to work together to close the gap between people's willingness to leave a gift in their Will and the proportion who ultimately do so, helping to unlock greater long-term funding for good causes.

Key findings: Professional Adviser Tracking Study 2026

Professional advisers are playing an increasingly important and active role in championing legacy giving. And the research shows that these discussions are becoming even more relevant in the changing Inheritance Tax landscape.



More advisers talking legacy giving with clients

Almost 9 in 10 solicitors & Will-writers (89%) raise the topic of leaving a charitable bequest proactively with clients.



Fiscal incentives the top reason for raising the charitable option

The top driver for mentioning charitable bequests is mitigating Inheritance Tax, cited by 52% of advisers.

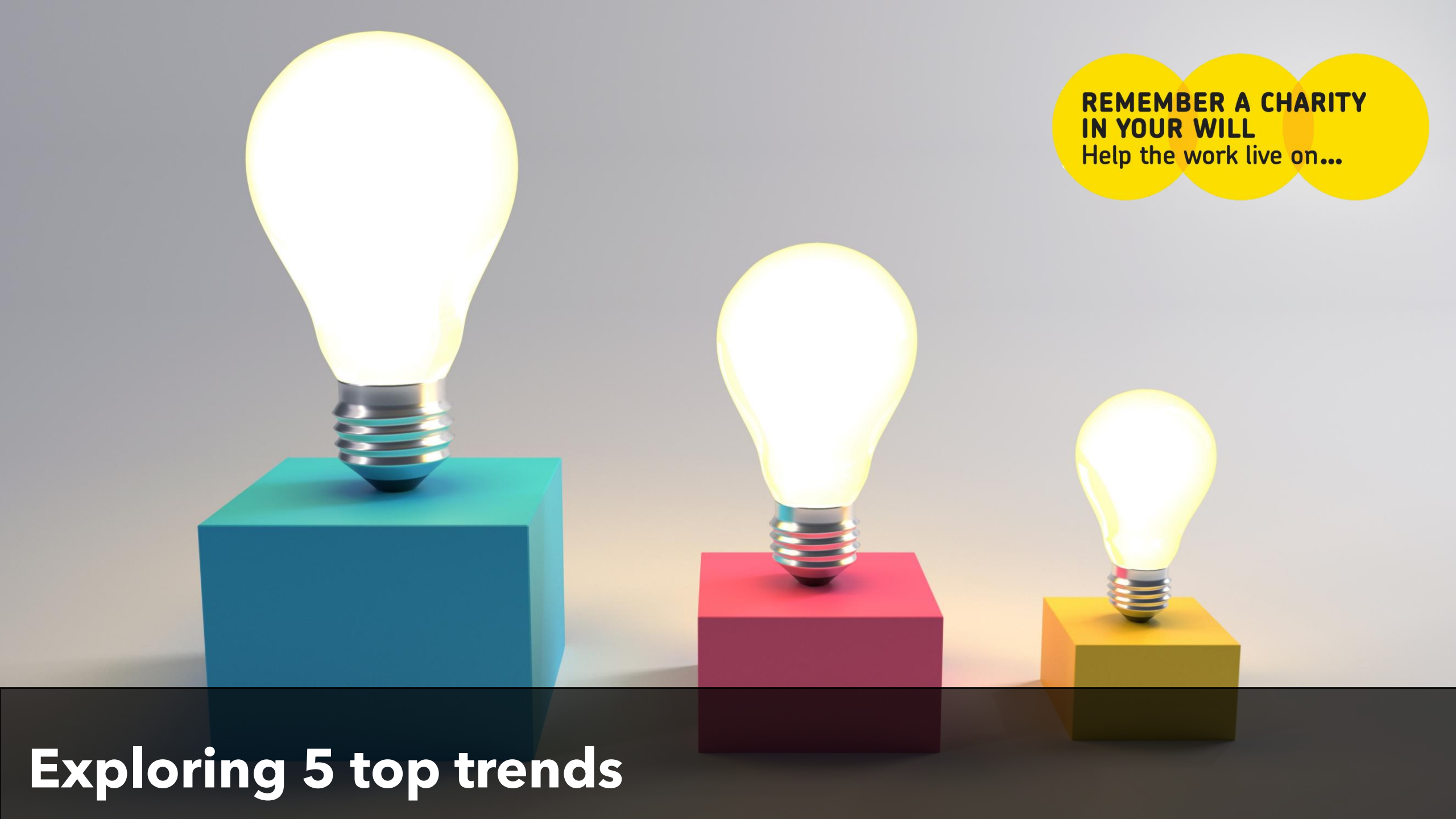


Almost 3 in 10 Wills include a charity

On average, 28% of Wills written through a professional adviser includes a charitable bequest.

Source: Savanta, Professional Adviser Tracking Study 2026
Sample 258 professional advisers, Feb-Jul 2026.

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Exploring 5 top trends

1. The changing Inheritance Tax landscape is reshaping estate planning

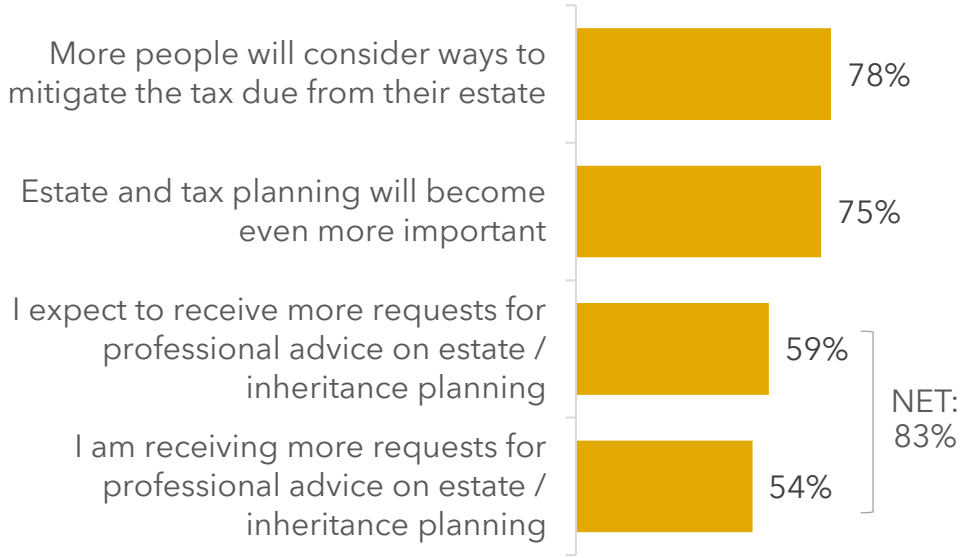
More than 8 in10 advisers say they are receiving or expect to receive more client requests for advice on estate and inheritance planning

The changing Inheritance Tax (IHT) landscape is already driving greater demand for estate planning.

When asked how they expect the freeze on IHT thresholds and inclusion of unused pension wealth from April 2027 to impact clients and their services, 83% of professional advisers said they are already receiving or expect to receive more requests for advice.

The large majority of professional advisers expect more clients will be looking to mitigate the tax due from their estate (78%), and that estate and tax planning will become even more important (75%).

Impact of the changing IHT environment on clients and advisory services



Source: Savanta, Professional Adviser Tracking Study 2026
Sample 258 professional advisers, Feb-Jul 2026.

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...and influencing the environment for charitable legacies

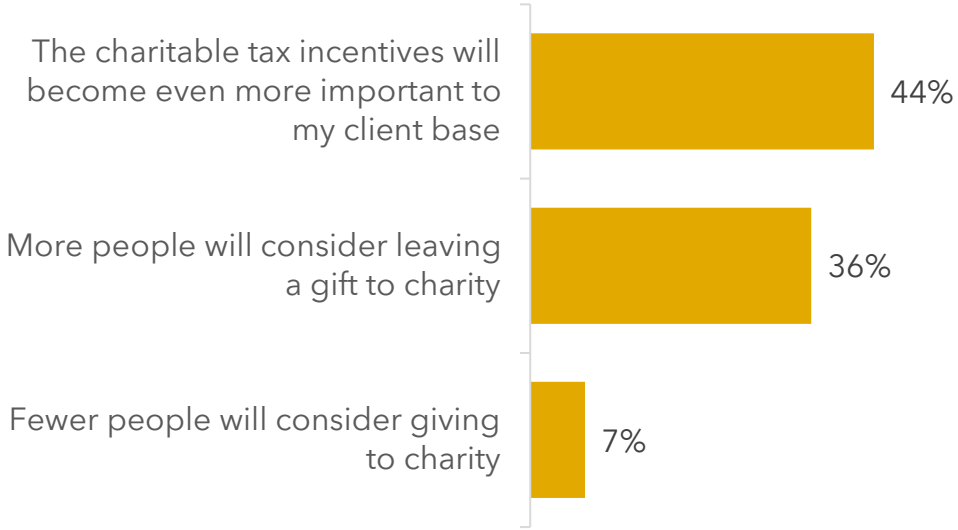
We asked too what the IHT changes could mean for charitable legacies.

More than 4 in 10 advisers say they expect charitable tax incentives to become more important to their client base (44%). Over one third expect more people will consider leaving a charitable gift (36%).

Less than 1 in 10 thought this would reduce the volume of people considering leaving a charitable gift (7%).

What are the tax incentives?
Donations to charity are tax-free and gifts of 10% or more of the net value of the estate can reduce the IHT rate by 10% (from 40% to 36%).

Impact of the changing IHT environment on client appetite for charitable legacies



Source: Savanta, Professional Adviser Tracking Study 2026
Sample 258 professional advisers, Feb-Jul 2026.

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2. More advisers are raising the charitable option with clients

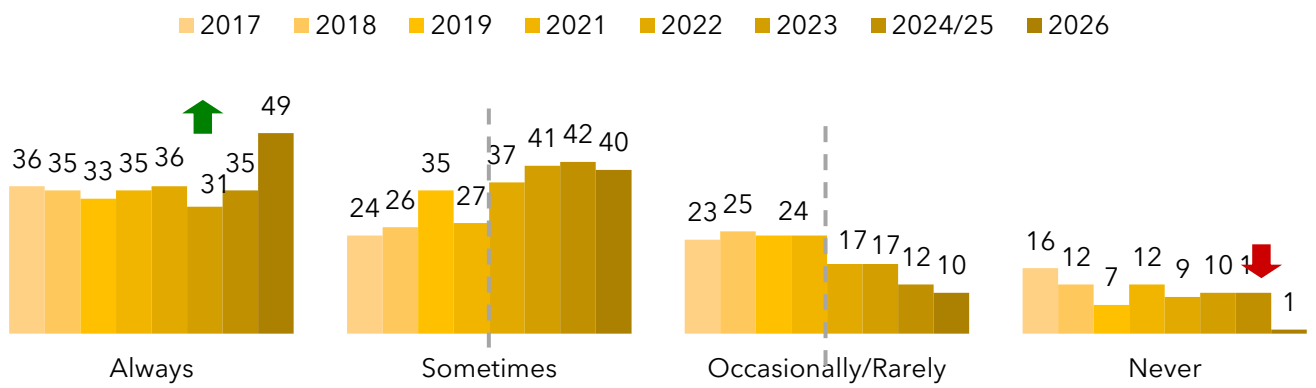
Charitable bequests are becoming a more common talking point for advisers and their clients. Increasingly, advisers proactively raise the topic of leaving a charitable gift in their Will with clients.

In this year's study, almost 9 in 10 solicitors and Will-writers (89%) said they *always* or *sometimes* raise the topic with clients, and around half (49%) always do. Only 1% say they never bring the topic up.

Similarly, 8 in 10 advisers (80%) say their clients *always* or *sometimes* ask about the charitable option themselves.

Almost half of advisers (49%) say they always raise the charitable option with clients

Frequency of mentioning charitable bequests spontaneously (%)



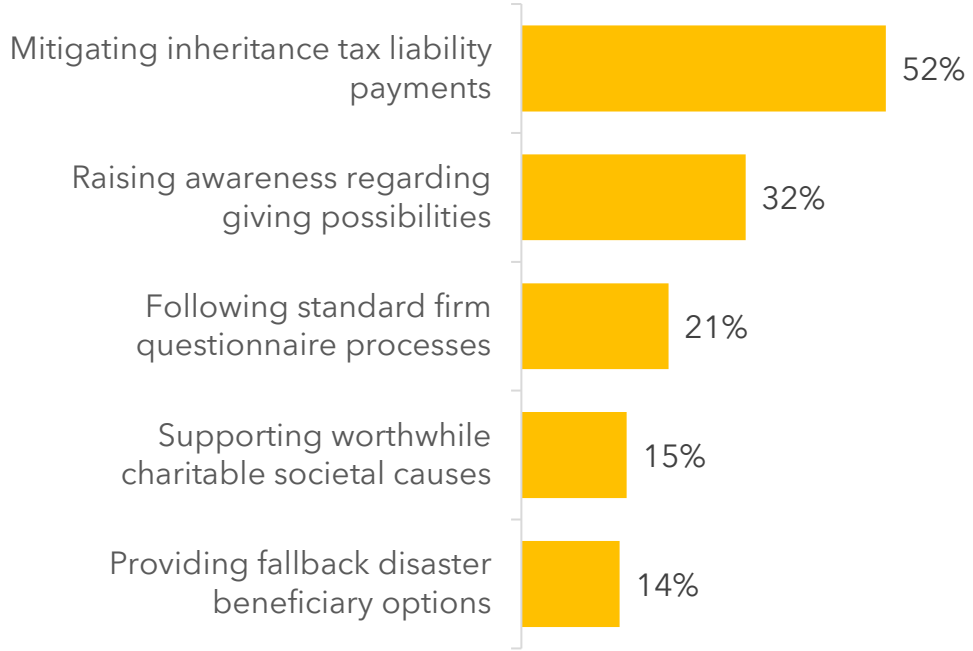
*Occasionally' changed to 'Rarely' in 2022

Source: Savanta, Professional Adviser Tracking Study 2026
Sample 258 professional advisers, Feb-Jul 2026.

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3. Tax incentives – a natural conversation starter for charitable estates

Top reasons for raising the topic of charitable legacies with clients



Did you know that 9 in 10 advisers discuss the IHT benefits of charitable legacies with clients?

When asked why they raise the charitable option with clients, tax incentives are the most common reason given – cited by 52% of professional advisers.

However, one third say it's to raise awareness regarding giving possibilities and one in five say it's now part of their firm's standard processes.

The large majority (94%) of solicitors and Will-writers and 79% of financial advisers *always* or *sometimes* advise their Will-writing clients about the charitable tax incentives.

Source: Savanta, Professional Adviser Tracking Study 2026
Sample 258 professional advisers, Feb-Jul 2026.

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4. Reasons vary for why advisers don't *always* raise the charitable option

1 in 5 advisers (20%) avoid referencing the charitable option because they think clients already know what they want to do with their estate



Clients are happy to discuss charitable legacies – 4 in 5 advisers in this study (79%) say that clients are *very* or *quite comfortable* to talk about charitable legacies. However, not all advisers regularly raise the issue with clients.

When asked why they don't *always* make clients aware of their option of including a charitable donation in their Will, advisers are most likely to say that this is because clients want to focus on their family as beneficiaries. However, undue influence and the belief that clients already know what they want to do are also key factors.

What are the top reasons advisers give for not raising the charitable option?

- Clients want to prioritise immediate family members (26%);
- To avoid influencing clients' decisions (23%);
- The perception that clients already know what they want to do with their estate (20%).

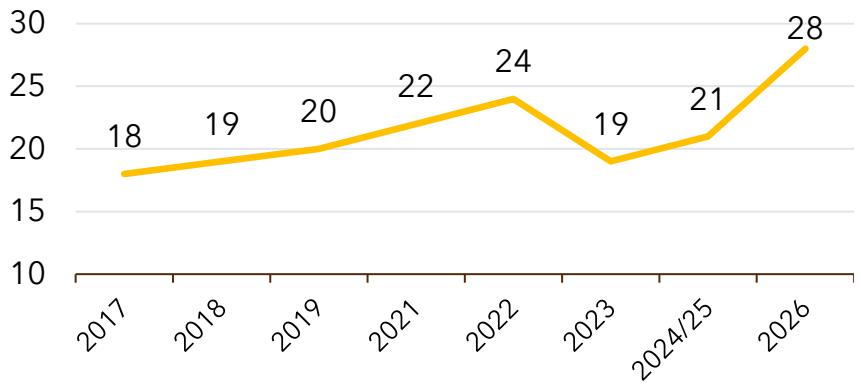
Source: Savanta, Professional Adviser Tracking Study 2026
Sample 258 professional advisers, Feb-Jul 2026.

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5. Charitable Wills are becoming more commonplace

On average, almost 3 in 10 of Wills written through advisers in this study include a charitable gift (28%)

Average proportion of wills which include charitable bequests (%)



This long-term professional adviser study indicates growth in the average proportion of charitable Wills written through solicitors and Will-writers, rising from 18% in 2017 to 28% in 2026.

The findings echo the trends reported in our consumer tracking study, carried out by OKO, which highlights a long-term rise in legacy giving, with younger generations choosing to write their Wills and leave charitable gifts at a younger age.

The large majority of advisers in this study (94%) work with firms that have assisted in the administration of an estate containing a charitable legacy, and over one half (54%) of solicitors & Will-writers say they currently partner with charities for Will-writing services.

Source: Savanta, Professional Adviser Tracking Study 2026
Sample 258 professional advisers, Feb-Jul 2026.

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Opportunity to close the gap

While this research highlights the key role that professional advisers play and the increase of charitable Wills, our consumer studies also indicate there remains further potential for giving in this way. There is an opportunity for greater consistency amongst advisers when discussing charitable giving alongside family and other beneficiaries. By making charitable giving a routine part of legacy planning conversations, advisers can enable more clients to fulfil their charitable intentions.



Widespread adoption
1 in 5 charity supporters aged 40+ have left a charitable gift in their Will (22%)*



Greater potential
Appetite is greater still – 1 in 3 who haven't yet left a gift are open to doing so (35%)*



Advisers are crucial
6 in 10 of people who discuss the topic with an adviser go on to leave a charitable gift.*

*Source: OKO / Remember A Charity, Stages of Change Report, 2026

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Appetite for more? Key findings from our consumer benchmarking study



Will-writing trends

6 in 10 charity supporters (63%) aged 40+ have written a Will



Almost half have never changed their Will

Almost half (49%) of people with a Will have never changed it.



People are writing Wills and leaving gifts earlier

The average age for a first Will is 50, but Gen X is writing Wills earlier than older generations

Click here to read more

Source: OKO / Remember A Charity, Stages of Change Report, 2026

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Free Campaign Supporter scheme

CAMPAIGN SUPPORTER

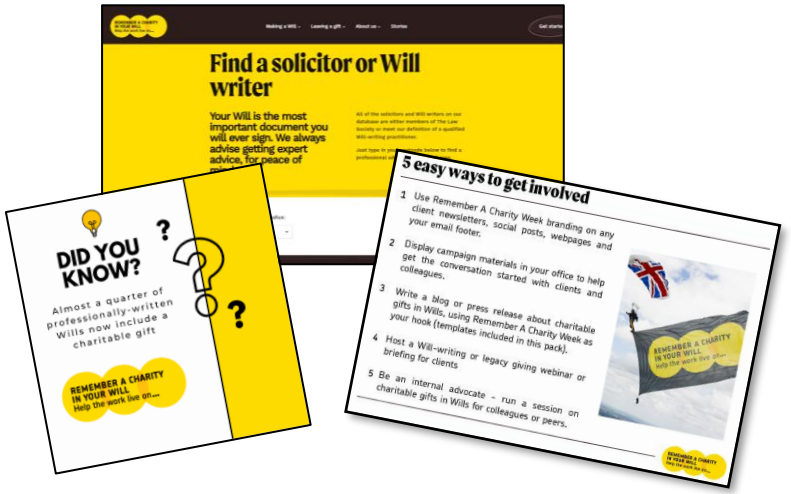
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Join 950+ solicitor firms and professional Will-writers in our Will-writing directory

It's free – all we ask is that you make your Will-writing clients aware of the option of including a charitable gift in their Will, alongside gifts for their loved ones.

Benefits include:

- Your details listed for free on our directory of solicitors & Will-writers
- Logos to show your support
- Participation in Remember A Charity Week
- Resources to help get the conversation started



Go to:
rememberacharity.org.uk/advisers

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New resources for wealth advisers



Explore our wealth adviser hub here

Resources for wealth advisers:

- 📈 Business case for exploring legacies
- 🎁 Key information on how a charitable legacy can be structured
- 📖 Case studies
- 💡 Practical tips and research for talking legacies
- 📒 Good practice guide
- 🖥️ Training – The Legacy Academy (4-part series)
- Legacy Friends Network (LinkedIn Group)

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Remember A Charity is a consortium of 200 charities working with government, the charity sector, legal and financial advisers to grow the charitable legacy market across the UK.

Find out more: rememberacharity.org.uk

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