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ENGAGING WEALTH ADVISERS AND HIGH NET WORTH SUPPORTERS TO GROW LEGACY INCOME

Key Learnings from the Panel Discussion and Member Workshop

This brief summarises the key points and learnings from an exclusive Remember A Charity event for members on Thursday 25th June 2026.

Introduction

Remember A Charity convened a panel discussion and interactive workshop exploring the ways that professional advisers and charities can work together to support high-net-worth clients in achieving their philanthropic legacy. The session brought together advisers, sector specialists and charity professionals to share insights into high-net-worth clients and supporters, build understanding of adviser-client relationships, explore challenges and identify opportunities for legacy growth.

The panel featured George King, Senior Wealth Manager at Maseco, James Cook, Partner of Russell Cooke LLP, and Sianne Haldane, Philanthropy and Impact Consultant, BOON Philanthropy Consulting, and was expertly chaired by Anaish Yilma-Parmar, Chair of Remember A Charity and Head of Legacies at the British Red Cross.

The panel discussion and workshop, led by Sianne, highlighted significant opportunities for charities to strengthen relationships with wealth advisers, better connect lifetime and legacy giving, and collaborate more effectively across internal teams.

Watch the full panel discussion and share with your colleagues (members only)

KEY POINTS FROM THE PANEL DISCUSSION

Legacy Giving Sits Within Wider Conversations About Wealth and Impact

One of the strongest themes from the panel was that legacy giving is rarely a standalone topic. Rather, it emerges naturally during broader conversations about wealth or estate planning, family, personal values and philanthropic ambitions. Legacy discussions may stem from and feed into a wider exploration of philanthropy.

For advisers, tax incentives are a key factor, but rarely a driver for giving in this way. Charitable legacies are a natural and key part of discussions about the impact clients want to have on future generations and society. Such conversations can be powerful opportunities for advisers to deepen their understanding of clients and their values, strengthening rapport.

What this means for charities

- Position legacy giving as part of a wider philanthropic journey, avoiding treating legacies as a separate fundraising proposition.
- Work holistically with other teams to deliver a collaborative and supporter-centric approach that allows and encourages them to give in a range of ways to achieve their desired impact.
- Aim to create and shape messaging that connects lifetime giving and legacy, with impact.

Recommendation

Review supporter journeys to identify opportunities where conversations about philanthropy could naturally lead into legacy giving discussions, and vice versa. This might include considering the option of blended giving and bespoke supporter journeys structured around the client's philanthropic goals.

Values and Motivations Are Key

The panel highlighted the importance of starting with a donor's values and aspirations rather than the technical aspects of estate planning.

While professional advisers play a key role in structuring gifts, the motivation to give is often rooted in a desire to create long-term change, to support causes that reflect personal values or to leave a lasting legacy. Some advisers will be more comfortable having these values-led conversations than others.

What this means for charities

- Supporter motivations amongst the high value market echo those of the wider legacy market, although impact is often crucial.
- Focus on building an understanding of why donors care, the difference they want to make and the impact they want to leave behind.
- Technical discussions can follow once motivations have been established.

Recommendation

Equip teams and advisory partners with discussion tools that help them explore values and impact, alongside gift mechanisms and tax benefits. (Resources are available at Remember A Charity's Wealth Adviser Hub.)

Demand for Philanthropic Advice is Growing

The panel noted growing demand from clients for support with philanthropy and charitable giving. Discussions highlighted that many clients expect advisers to be able to help them with philanthropic planning, while adviser confidence and engagement in this area are still developing.

What this means for charities

- There is increasing appetite amongst advisers to develop their understanding of philanthropy and charitable giving.
- This presents a significant opportunity for charities to support and engage advisers as a key partner in fulfilling their client's need.

Recommendation

Consider how your organisation can build relationships with wealth advisers or at least to be 'adviser-ready', offering resources that articulate the impact of your work and case studies to show how you can help supporters achieve their goals. Aim to position your charity as a trusted partner in philanthropy discussions.

Adviser Relationships Require Different Approaches

Participants recognised that professional advisers are not a homogenous audience. They will have different areas of expertise and play different roles within the wealth advice spectrum. Some advisers are highly engaged and actively champion philanthropy with clients, while others have less experience or confidence in this area.

The panel explored situations where advisers hold the primary relationship with the supporter and the charity may have little or no direct contact, only learning about a gift after the donor's death. This leaves advisers playing a crucial stewardship role.

What this means for charities

- A segmented engagement approach may be more effective than treating all advisers in the same way.
- Aim to identify the role that an adviser is playing, and how you can best support them in meeting their client's needs.
- Consider how adviser-led relationships fit within existing stewardship plans and ensure clear internal ownership across teams.

Recommendation

For any adviser relationships, it can be helpful to identify existing legacy champions, warm adviser contacts and new or less-engaged audiences. This will help to determine the most beneficial adviser relationships, prioritising investment. Make it easy for time-poor advisers to find clear, jargon-free information about your goals, programmes and impact on your website. Don't underestimate the power of storytelling in bringing legacy giving to life. Include testimonials or case studies about how legacy gifts can impact your mission.

Personalisation Remains Critical

A further theme throughout the discussion was that supporters and advisers value personal and responsive engagement. Rather than assuming what support is needed, fundraisers should seek to understand adviser and client preferences, with open questions and active listening.

What this means for charities

- Aim to discuss client and adviser preferences from the outset, exploring their preferred mode of contact and frequency.
- For clients, understanding their attitudes towards recognition or privacy is crucial.
- Where a restricted gift is being considered, shifting the discussion to an impact-based approach can help charities ensure clients and advisers understand how best to achieve their goals and the potential challenges of such restrictions.

Recommendation

Where possible, charities are encouraged to ask supporters and advisers how they would like to engage and to adapt stewardship accordingly, balancing personalisation with scalable resources and communications. Respect supporter choice while ensuring the benefits of being able to communicate with the donor are understood.

KEY LEARNINGS FROM THE WORKSHOP

During a workshop following the panel discussion, participants considered the insights from the panel discussion and explored how they might approach and steward relationships with supporters and their advisers, built around potential pledger and prospect scenarios. They shared practical experiences of collaborating with colleagues and advisers to support high-net-worth individuals with philanthropy and legacy giving, discussing the following key themes:

Collaboration Between Legacy and Philanthropy Teams is Essential

Participants discussed the value of close internal collaboration, with one participant sharing an example where they worked closely with their philanthropy colleagues to develop different options for fulfilling a donor's wishes while preserving the donor's intended legacy gift. The case study was praised as a thoughtful and donor-centred approach; one that was appropriate for the size of the gift.

Learnings

- The most effective solutions often emerge when legacy and philanthropy teams combine their expertise.
- Look for opportunities to share supporter insight across teams and co-create joint stewardship approaches and shared plans for high value supporters.

There is No Single 'Textbook' Approach

Workshop participants reflected on the complexity and individuality of donor situations and the need for flexibility, recognising that there is no singular pathway. One case study prompted discussion about managing competing priorities and finding solutions that reflected both donor wishes and organisational needs.

Learnings

- Successful outcomes rely on judgement, empathy and adaptability.
- Guiding principles for teams can be helpful, while recognising that individual circumstances require tailored responses.

Legacy and Philanthropy Conversations Naturally Connect

Participants identified multiple opportunities to link philanthropic giving and legacy giving more deliberately. A particularly useful reflection came from discussion around donor motivations, with one participant observing that supporters frequently describe wanting to achieve "long-term impact" or "lasting change". This creates a natural opportunity to discuss how a legacy gift could extend their impact.

Learnings

- Legacy giving should often be viewed as an extension of philanthropic ambition.
- When discussing motivations for major gifts or philanthropy, consider whether there are natural opportunities to explore longer-term impact and legacy aspirations.

Stewardship Should Reflect Supporter Preferences

Discussion also explored scenarios where donors choose not to have a direct relationship with the charity. Participants reflected on the importance of respecting those preferences while remaining open and responsive should donors wish to engage further.

Learnings

- Not all supporters want the same level of contact, recognition or involvement.
- There is the opportunity to create flexible stewardship options that allow supporters to engage in ways that feel comfortable and appropriate for them.

Building Adviser Networks Takes Time

Participants shared different approaches to adviser engagement. One example involved developing a two-tier adviser network, distinguishing between general contacts and advisers who were already more engaged and interested in philanthropy and legacy giving.

Learnings

- Relationships with advisers should be developed strategically and over time.
- Identify and nurture adviser champions who can help build momentum and influence wider adoption of philanthropic conversations.
- Aim to engage advisers and steward these key relationships with as much care as a high value legacy prospect, ensuring they have a named individual at the charity to build trusted rapport with.

Reflections

Across both the panel discussion and workshop, a common message emerged: successful legacy fundraising increasingly depends on connecting philanthropy, wealth planning and legacy giving through meaningful, values-led conversations. For charities, the greatest opportunities lie in:

- Focusing on donor motivations and desired impact, and providing flexible, personalised stewardship.
- Integrating legacy and philanthropy strategies.
- Working collaboratively across internal teams.
- Building stronger relationships with professional advisers.

As philanthropy becomes a more established part of wealth planning conversations, charities have an important opportunity to position legacy giving as a natural and powerful way for supporters to create lasting change. This also creates the potential to engage advisers and help them view legacy discussions as a key lever to strengthen and unlock multi-generational client relationships.

Next steps:

Charities looking to strengthen their high value legacy giving programmes may wish to:

- Audit how legacy giving is introduced in philanthropy conversations.
- Review opportunities to strengthen engagement with high value supporters and wealth advisers.
- Strengthen collaboration between legacy and major donor/philanthropy teams.
- Understand the different charitable legacy structures and tax incentives
- Establish some general principles and supporter pathways for high value legacies.
- Explore how to capture and respond to donor motivations and preferences.
- Develop high value legacy case studies with a focus on demonstrating impact.

For more information:

Explore Remember A charity's Wealth Adviser Hub

Members Only resources for High Value Legacies

Watch the panel discussion