

Top tips: Eight steps to building your legacy fundraising strategy

1. **Get to know your prospects:** Research your legacy prospects to help you understand who they are and what drives them. Remember that they might not be on your supporter database – they could be volunteers, beneficiaries, corporate partners and many others. A good starting point is to aim to identify those with a long-term commitment to your charity, and to understand their connection to the cause. Consider the touchpoints you have with them and other potential legacy supporters. Could you add a question to your supporter survey or other communications, asking if they would like to find out more about leaving a gift in their Will or to tell you if they already have?
2. **Define your legacy proposition:** Build on what you know about your supporters and their values to develop a legacy proposition that conveys a compelling narrative and a clear call to action. This might be to inspire your audience to support the cause for generations to come or to empower them to drive change beyond their lifetime. Explore other charities' legacy messaging for inspiration before you shape your own. As your proposition will be at the heart of your legacy messaging, it's important to test how it resonates with your audiences. Does it inspire them to leave a gift?
3. **Build support internally:** Internal buy-in is a must for legacy success so, aim to educate, recruit and engage internal champions from the start. Make sure all those who might interact with potential pledgers have the information they need to be a legacy advocate, from your CEO and Trustees through to volunteers and fellow fundraisers. Don't forget to share legacy successes internally too. This will help to ensure that everyone understands the value of legacies, and is enthused to help.
4. **Plan your approach:** Plan how and where you can engage your legacy prospects, enabling you to drip feed the message at key points throughout their supporter journey. While this can include anything from social posts and emails through to focused direct mail campaigns, remember to communicate personally and individually where possible, whether that's through letters, calls, or events. What opportunities do you have to open up legacy conversations through your existing channels, services or sites?

5. **Engage and inspire your audience:** Aim to build genuine relationships, establishing trust and sharing inspiring stories of legacy gifts and what they can achieve. Let supporters know that their gift will be valued, no matter what size, and that it can fit around their wishes for their loved ones. Be approachable and encourage supporters to ask any questions of you, giving you opportunities to foster relationships.
6. **Make it easy:** ‘Legacy giving’ might sound daunting to some, so it can be helpful to use the term ‘giving from your Will’. Where possible, break down the steps involved and avoid legal jargon, making it as easy as possible for supporters to take action. Consider offering tips or a [short guide on your website](#) about how to write a charity into their Will and the different options for supporters – whether that’s leaving a fixed sum, a percentage of their estate or a specific asset or item. Take care to avoid giving legal advice. Many charities will offer referrals to a local solicitor or Will-writing provider who can give supporters the advice they need.
7. **Nurture your supporters:** Whether you know someone has pledged a legacy or simply that they are intending to do so, make them feel special, thanking them and the families of legacy givers who have passed on. Site visits or events can be a great way to ensure supporters continue to feel engaged, inspired, and valued. Use them to keep people up to date with what you’re doing, to introduce them to different aspects of your work – and of course to continue to talk about the impact of legacy gifts.
8. **Give it time:** Legacy fundraising isn’t a short-term option. You’ll need to be patient – but it’s likely to be well worth the wait. The return on investment for legacy fundraising can be hard to beat. And, while it’ll take time for the income to come through, you can track engagement and response rates to campaigns, alongside any likely gifts from those who say they have pledged or intend to leave a gift. Don’t forget that, in many cases, a legacy gift is a surprise to the charity and the first you hear about it is after the supporter has passed away.

This sheet is not intended as comprehensive guidance, but features some top tips to help with your legacy fundraising. For more tips and resources, go to www.rememberacharity.org.uk.