



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

**Using social norming to encourage
charitable gifting in wills**

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About Remember A Charity

[Remember A Charity](#) is a consortium of close to 200 UK member charities and partners, working together with the legal and financial sector to raise awareness of charitable gifts in Wills and make it the social norm.

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Why mention the option of charitable legacies to your clients?

Legacies are a vital source income to the charity sector, generating over £4 billion* for good causes each year.

- At Dogs Trust, gifts in Wills fund over 40% of all their work, enabling the charity to love and care for thousands of dogs.
- 6 out of 10 RNLI rescue launches would not be possible without gifts in Wills.
- Gifts in Wills contribute to over 50% of British Heart Foundation's funded lifesaving research.



*Smee & Ford / Legacy Futures, 2025



Our research shows that 40% of the public would be happy to leave a small amount to charity after they have looked after loved ones*... but only 7% of those who have died have actually done so.

Remember A Charity exists to help grow the legacy market, by addressing this disconnect with current giving behaviour by raising awareness and increasing understanding amongst the public.

We want to ensure that professional advisors consistently mention the charitable option when advising clients.

We and the charity sector are of the strong belief that everyone should have a professionally drafted Will.

We also always recognise the importance of looking after after family and friends first before considering a charitable gift.

Our latest benchmarking research showed that 77% of professional advisors always or sometimes mention the option of charitable gifts to their clients**.

*Opinium, Remember A Charity Week survey 2023

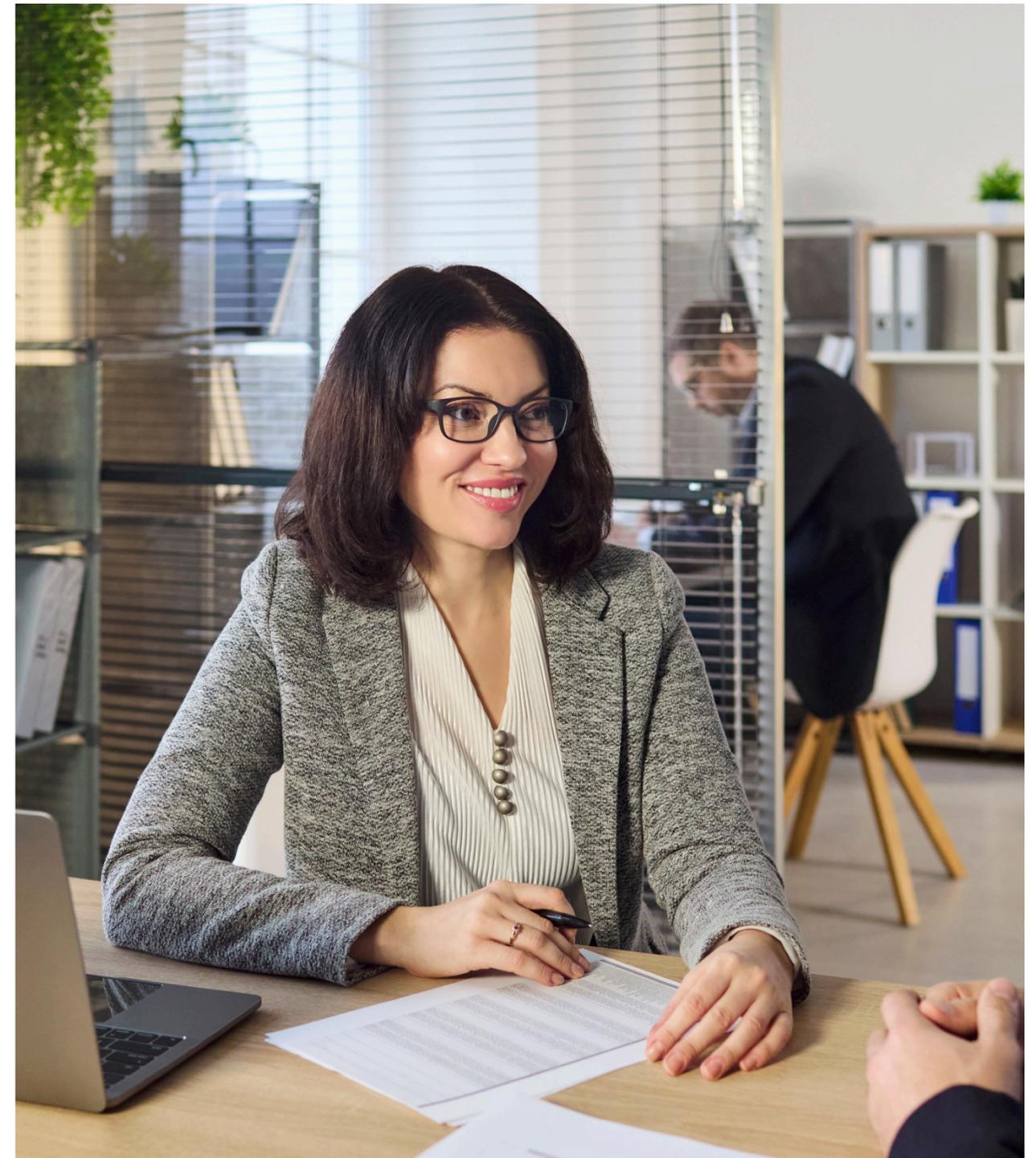
**Savanta, Remember A Charity Professional Adviser Benchmarking, 2024

However...

We know that **11%** never mention it*, and some advisors even actively discourage their clients from including a gift to charity.

We know that including a charitable gift won't be the right decision for everyone – but we also know it's in the client's best interests to understand all the options available to them during the Will-writing process.

*Savanta, Remember A Charity Professional Adviser Benchmarking, 2024





Cabinet Office
Behavioural Insights Team

How best to mention the option of charitable legacies to your clients?

We carried out research with the Cabinet Office Behavioural Insights Team which showed that when solicitors mention the charitable option to clients, and if framed in the right way, it can have a huge impact on giving behaviour.

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The Behavioural Insights Team looked at using a trigger to prompt more people into leaving money to charity in their wills. They used social norms as that trigger, encouraging people to nominate a charity in their will by reminding them that many other people had also left charitable legacies.

Collaborating with our partners, Co-operative Legal Services, the trial ran on 1,000 customers who were given different messages by Will writers:

Will writer A [Baseline]: Customers not specifically asked to donate.

Will writer B [Plain ask]: “Would you like to leave any money to charity in your will?”

Will writer C [Social norms]: “Many of our customers like to leave money to charity in their will. Are there any causes you are passionate about?”



Normalising

“Many of our clients like to leave money to charity in their will.

Are there any causes you’re passionate about?”

Emotion

The best wording was found to be the third group, ‘Social Norms’.

Importantly, this wording combines both normalising and emotion.

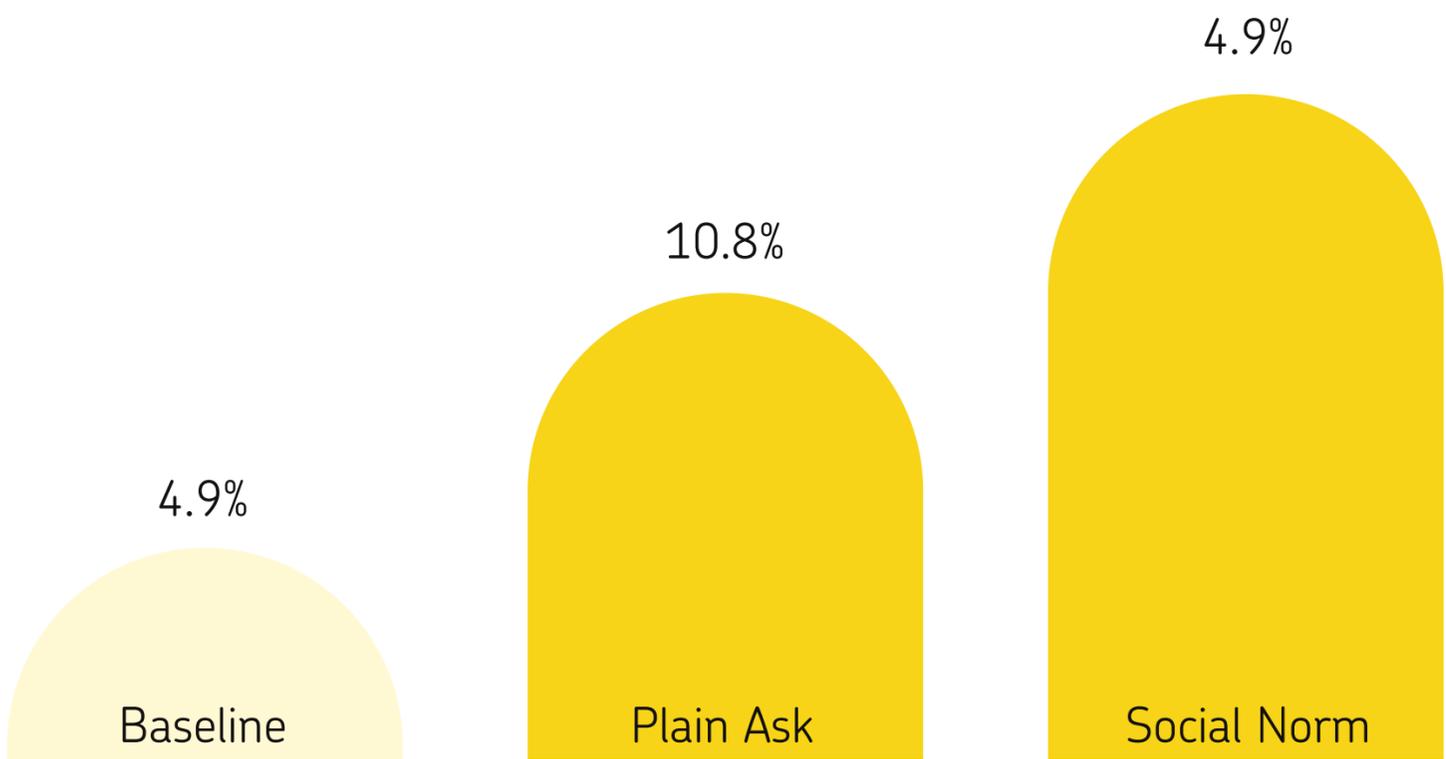
Leaving a legacy is both a rational and emotional decision, so its important to recognise that.

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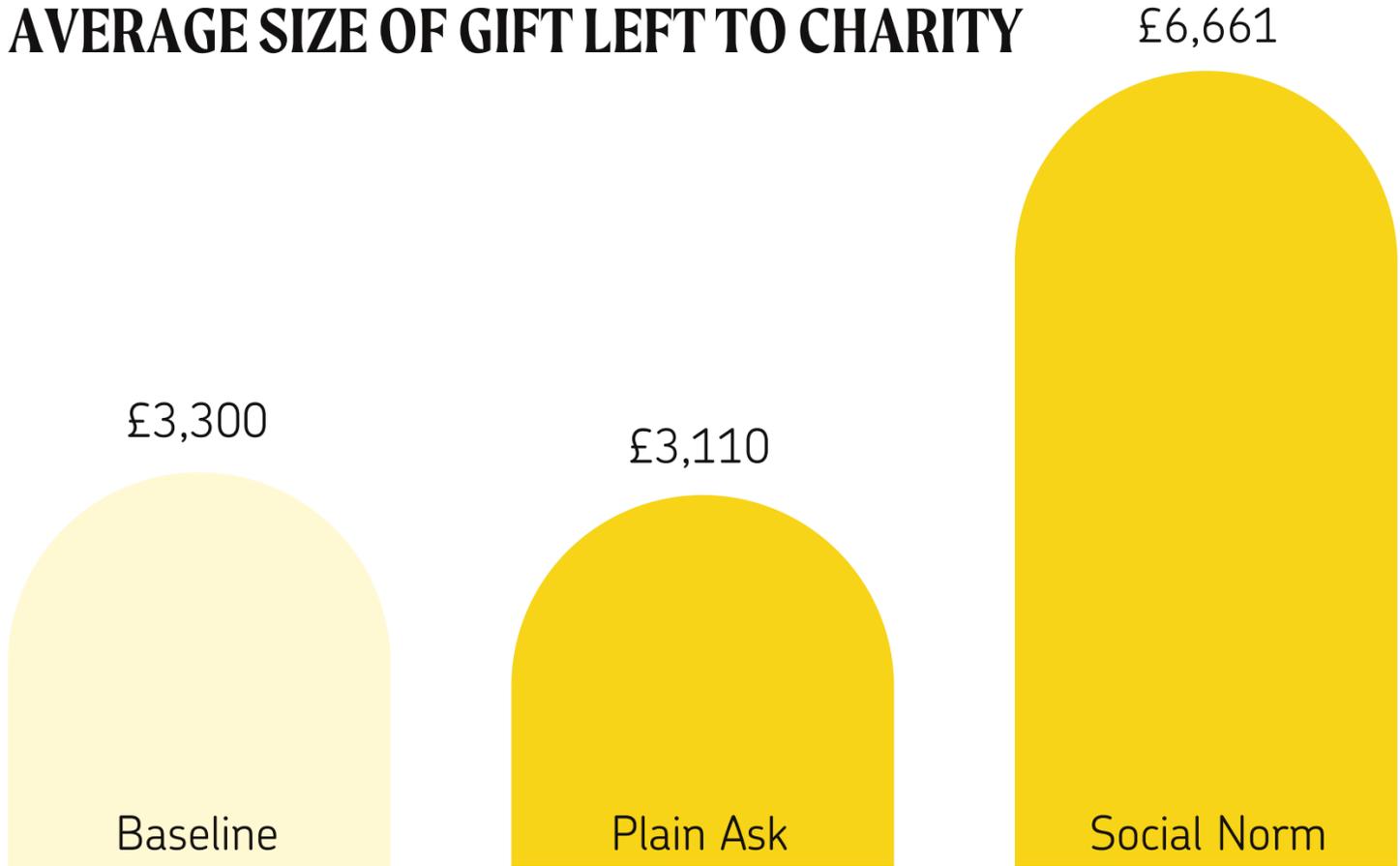
The results showed that by using the social norming approach, it tripled the number of those who chose to leave a gift to charity.

More impressive still, the average donation among people in the third group is **£3,300** larger than those in the first group.

THOSE WHO CHOSE TO LEAVE A GIFT TO CHARITY

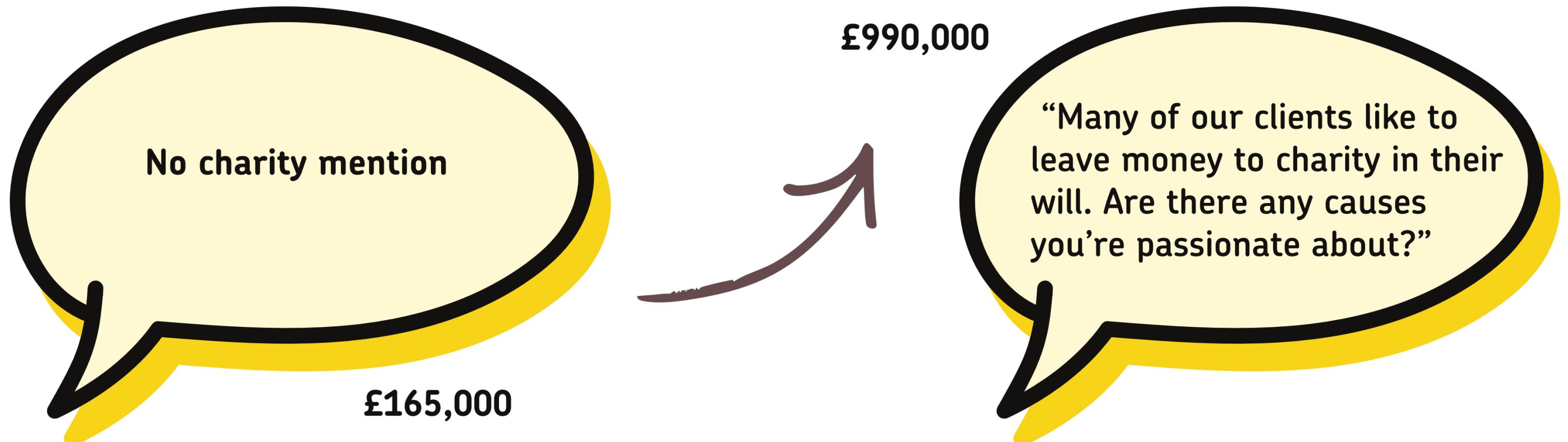


AVERAGE SIZE OF GIFT LEFT TO CHARITY



The difference you can help make...

Overall, there were 1,000 individuals in each of the treatment groups. In total, the Social Norm group alone raised a total of £990,000, which represents an increase of £825,000 above the baseline. So this is just an example of the difference you could help make.



IHT as a conversation starter

One easy way to bring up the topic is to mention how leaving money to charity can be a way of reducing how much of your client's estate ends up with HMRC. ([See other conversation starters here.](#))

Not only will any portion left to charity not count towards the total taxable value of the estate, but if at least 10 per cent or more of a net estate is left to charity your client benefits from an IHT discount – reducing the rate of tax from 40% to 36%.

With [changes to the IHT framework to include pensions coming into effect from 2027](#), a greater number of people may find themselves above the IHT threshold. The reliefs associated with charitable giving are therefore likely to become even more important, as people begin to change the way they approach their estate planning.



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So, what can you do to help?

Please always mention the option of including charity to your Will-writing clients – it makes such a difference to both your clients, and to the vital work of good causes across the UK.

Additional Tools and Resources



Resources

We have [a range of resources](#) to help you start these important conversations, including research, fact sheets and webinars.



Monthly Bulletin

Sign up to our [monthly professional adviser bulletin](#) for all the latest news and developments in the world of gifts in Wills.



Legacy Friends Network

Join our [Legacy Friends Network](#) on LinkedIn, where you can share knowledge, ask questions, and collaborate with your peers.

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Thank you!

Thank you for supporting conversations that highlight charitable giving as a natural and valuable part of will-making.

To find out more, please [visit our website.](#)

If you have any questions, [please get in touch](#) with our friendly team!

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