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

Inspiring Change, Changing Futures: Our Impact in 2025

Introduction from our Chair

2025 was a special year for our membership community, marking one quarter of a century of collaboration through Remember A Charity to grow the UK's legacy market. It was a year of celebration – recognising all that can be achieved when we draw together, and a year of impact, where we continued to drive change.

Reflecting on our work, a few areas really stood out for me – the continued strength of our consumer programmes in engaging new audiences with legacy giving, and our collective power to influence the worlds of Will-writing, philanthropy, and future legislation through our strategic partnerships and with a sustained lobbying voice.

The breadth of our consumer work programmes has been incredibly powerful, not just for raising awareness, but also building a real understanding and inspiring more people to leave a gift in their Will. It was hugely exciting to see the consortium's legacy messaging back on our TV screens for the first time in over 10 years as part of the 'Be Remembered' campaign, reaching more people and raising the profile of our work. This activity helped drive a 64% increase in overall ad reach across digital, print, radio, and TV.

We also strengthened our member offering with training, in-person events, and a comprehensive range of member-only resources. This included a trustee webinar during Remember A Charity Week and a new toolkit on making the case for legacy investment, helping our members build understanding at leadership level, strengthen conversations, and unlock the investment needed to support future growth.

Looking ahead, I truly believe our collective approach is our greatest strength. By continuing to work together and nurture a culture of generosity, we can ensure that charitable legacies make a meaningful difference for the communities and causes we support.

Anaish Yilma-Parmar,

Chair, Remember A Charity

The collective work of charities under the umbrella of Remember A Charity is so important, and so well judged. It's a great example across the sector of fruitful collaboration between charities – in the interests of those who rely on your work, and the interests of a stronger, fairer society."

Mark Simms, Acting Chair of the Charity Commission for England and Wales

Making legacy giving a social norm

657,000
unique web visits

PR media reach of
600 million

Advertising reach of
11 million

22%
of supporters aged 40+ have included a charity in their Will

Engaging new audiences

During the year, our national consumer campaign continued to shift public attitudes and behaviour towards leaving gifts in Wills.

Reaching millions

Our consumer programme ran in targeted bursts throughout the year to build awareness of legacy giving and encourage more people to take action. Key moments included a personal finance PR campaign featuring ex-Blue Peter presenter Janet Ellis in January, the release of our consumer tracking research in spring, and Remember A Charity Week in September. PR alone achieved a media reach of almost 600 million, with in-depth feature coverage building understanding of legacy giving and debunking common myths. Advertorial placements in The Guardian, The Telegraph, and The London Standard further extended the campaign's messaging at topical and timely moments.

1. OKO / Remember A Charity, Stages of Change 2025

A return to TV

With our digital advertising continuing throughout the year to keep legacy giving front-of-mind, we continued to build on our warm and engaging ‘Be Remembered’ advertising series, introducing new characters – with shareable assets for our member charities. The campaign celebrates people’s quirks and loveable traits alongside their charitable legacies, inspiring our target audiences to consider how they wish to be remembered and the opportunity of including a charitable gift in their Wills.

In 2025, for the first time in over a decade, we aired our top performing advert on TV, alongside radio and print during September. The TV advert alone reached almost 15% of UK adults aged 65+, while the combined impact of our year-round consumer engagement activity - with a reach of over 11 million - drove up visits to the campaign website by 58% to 657,000.

Voices that resonate

During Remember A Charity Week, our members’ legacy messaging was front and centre of our ‘Thanks To’ PR campaign, which celebrated the impact of gifts in Wills with personalised and emotive thank you messages from beneficiaries. The campaign was supported by the much-loved TV presenter and author, Johnny Ball.

Meanwhile, we partnered with three trusted influencers on digital - Lost Voice Guy, Amanda Lamb, and Charity Shop Girl - to use their platform to share their own stories about the charities they support and why they will be remembering them in their Will.

Johnny Ball

Lasting change

Crucially, the long-term nature of the campaign is helping to drive behaviour change over the years and normalise legacy giving. Our latest benchmarking research with OKO shows that 22% of charity supporters aged 40+ have now included a charitable gift in their Will. What’s more, over one third (35%) of those who haven’t yet left a gift say they are open to doing so, leaving significant room for growth.

Lost Voice Guy (Lee Ridley)

Influencing the Influencers

77%
of solicitors and Will-writers raise the topic of legacy giving

925,000
media reach to the legal and financial sector

9 in 10
solicitors talk charitable legacies more with clients after our training[2]

930+
Campaign Supporters

Engaging with estate planners and wealth advisers to grow giving

Collaborating with professional advisers – solicitors, Will-writers, wealth advisers and others – remains a key part of our strategy to grow legacy giving. This ensures we can not only normalise charitable giving during estate planning but build understanding about the more complex elements – from percentage gifts to the charitable tax incentives, supporting the growth of higher value gifts.

Last year, we increased our PR and marketing activity in the legal and financial sector, achieving a reach of over 925,000, ensuring charitable legacies were front-of-mind for advisers and their clients at key points throughout the year. We expanded our Campaign Supporter scheme, and this now includes over 930 solicitor firms and Will-writers who routinely advocate for legacy giving during estate planning.

Behind the scenes, our legal sector advisory group and wealth adviser committee provide vital strategic insight and leadership for the consortium, while also serving as a supportive peer-to-peer network of philanthropic advisers. Close working relationships with trade bodies – from STEP to the Association of Lifetime Lawyers, BEST Foundation to The Institute of Professional Will writers and The Society of Will writers – have all helped to amplify our reach at industry level.

The cumulative impact is a thriving network of legacy ambassadors and advocates. In our latest professional adviser tracking study, conducted by Savanta, over three quarters (77%) of solicitors and professional Will-writers said they always or sometimes raise the option of legacy giving with clients[3].

2. For Legal, 2025 3. Savanta / Remember A Charity, Professional Adviser Benchmarking Study, 2025

"At Hugh James, we see large numbers of clients choosing to include a charitable gift in their Will, and it's become one of the most meaningful parts of our conversations. For many people, it's a chance to create something positive and lasting – often a really empowering part of the Will-making process. It allows them to reflect their values, support causes that shaped their lives, and leave a legacy that feels deeply personal. Helping clients explore that possibility is genuinely one of the most rewarding aspects of Will writing."

Eleanor Evans TEP, Partner at Hugh James

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FOR LEGAL
Learning without limits

Legacy Academy Series

Tax, Structures and Legacy Giving

This session will explore how high net worth clients value proactive advice on philanthropy and estate planning, covering legacy discussions, charitable giving structures in Wills, donor advised funds, tax benefits, recent regulatory changes, and practical tips for advisers.

Key Facts:

- There are generous tax incentives available for those who leave gifts to charity from their estate – donations to UK charities are tax-free and gifts of 10% or more of the net value can reduce the Inheritance Tax (IHT) rate from 40% to 36%
- The changing fiscal environment around IHT makes it all the more relevant and important to talk to clients about these incentives
- Legacy giving can be very flexible, with the opportunity for clients to support any UK charity, structuring donations as a fixed sum or residuary gift
- In many cases, high net worth clients are incorporating charitable gifts through Will Trusts or using Donor Advised Funds
- Wealth advisers are not expected to be philanthropy experts, but by getting the conversation started and working collaboratively with other specialists and charities, they can play a key role in helping clients achieve their philanthropic legacy

James Cook
Partner, Russell Cooke LLP
James works in estate and succession planning, wills, probate, trusts and more.

Tatiana Watson
Senior Director, Alvarez & Marsal Tax
Tatiana looks after wealthy individuals and their families working closely with family offices, trustees and charitable foundations.

Rachel Steeden
Head of Legal, Stewardship
Rachel Steeden is an experienced private client lawyer now working in-house at Donor Advised Fund provider Stewardship

“As we move into our second year of the committee, I’m proud of the group’s continued commitment, the expanded pool of expertise, and our increased focus on training and shared learning. Legacy conversations are not always easy, but they are powerful. When we make space for them, we don’t just help clients plan – we help them understand what truly matters to them. In doing so, we build stronger, more meaningful relationships that can last beyond a lifetime.”

Clare Stirzaker, Chair of Remember A Charity’s wealth adviser committee and Private Wealth Partner at Boodle Hatfield:

Training and best practice

With a focus on driving long-term change, CPD training for estate planners remains a key facet of our work programme for professional advisers. Delivered in partnership with For Legal, our training content is promoted to thousands of solicitors and Will-writers each year, addressing common misconceptions and sharing best practice in the field. Achieving impact, 9 in 10 training participants[4] in 2025 said they were more likely to discuss charitable giving with clients after having completed one of these sessions.

Last year, Remember A Charity launched the first CPD training series on charitable legacies for wealth advisers across the UK. This four-part Legacy Academy series provides an overview of legacy giving, the options for structuring high value legacies, it explores how charitable legacies fit in a wider succession planning context and offers an engaging interview with a philanthropist.

The training programme is complemented by a growing range of tailored resources, which have been co-created with our advisory network and are freely available from our online hub for wealth advisers. Through workshops and events, we brought advisers together to build their knowledge and confidence in discussing charitable legacies with clients.

"It's been wonderful to see growing commitment from both advisers and charities to nurture high value supporters on their legacy journey. Increasingly, charities are becoming more proactive in this area, treating legacies as part of a wider philanthropic conversation with major donors, and there's greater recognition of the crucial role advisers play in this space. Many advisers are using charitable legacies as a natural starting point for deeper discussions with clients about their values and long-term impact, tapping into the new resources, training and support from Remember A Charity.

"These gifts have the power to shape family values, strengthen family legacy and create an extraordinary and lasting difference for the charities they support."

Sianne Haldane, Founder of Boon Philanthropy and Chair of the STEP Global Philanthropy Advisors Special Interest Group.

4. Reference: For Legal

Nurturing the legacy environment

Influencing policy,
regulations, guidance and best practice

Positioning legacies
as a core part of national philanthropy initiatives

Engaging decision-makers
with the importance of legacies

Creating the right conditions for legacy giving to thrive is crucial. As a collective voice, we have the capacity to shape policy, legislation and sector practice, ensuring our members' views are represented and heard by Government, regulators and policy-makers.

We are proud to work closely with our partners at the Institute of Legacy Management and colleagues at the Chartered Institute of Fundraising and other sector bodies, ensuring that legacies have a strong sector voice and that our members are at the heart of that movement.

New partnerships have been developed with representative groups in England, Scotland, Wales and Northern Ireland, getting legacies on the table across the UK.

Voice for legacies

In 2025, we influenced Government policies and guidance around the fiscal landscape for charitable legacies, together with best practice standards for charitable Will-writing and legacy fundraising in the Code of Fundraising Practice.

This included responding to consultations on the Finance Bill 2025-26 with the aim of safeguarding charities' ability to benefit from legacy income, minimising administrative burdens and calling for guidance for charities on key areas of change. And, with pension wealth coming into the scope of IHT from April 2027, we urged Government to reduce the barriers that prevent people from donating unused pension funds tax-effectively through a charity lump sum death benefit.

Working with HM Courts & Tribunals Service, we continue to track probate performance, while coordinating charity site visits for probate teams, ensuring they understand the charitable impact of their work and building staff engagement.

"Working together, we can influence change in a way that wouldn't be possible or as efficient for individual charities, enabling us to drive change and grow legacy giving across the UK. As we move forward, our focus remains on influencing the policies, attitudes and behaviours that will not only grow legacy income here and now, but shape the giving culture and behaviours over the long-term."

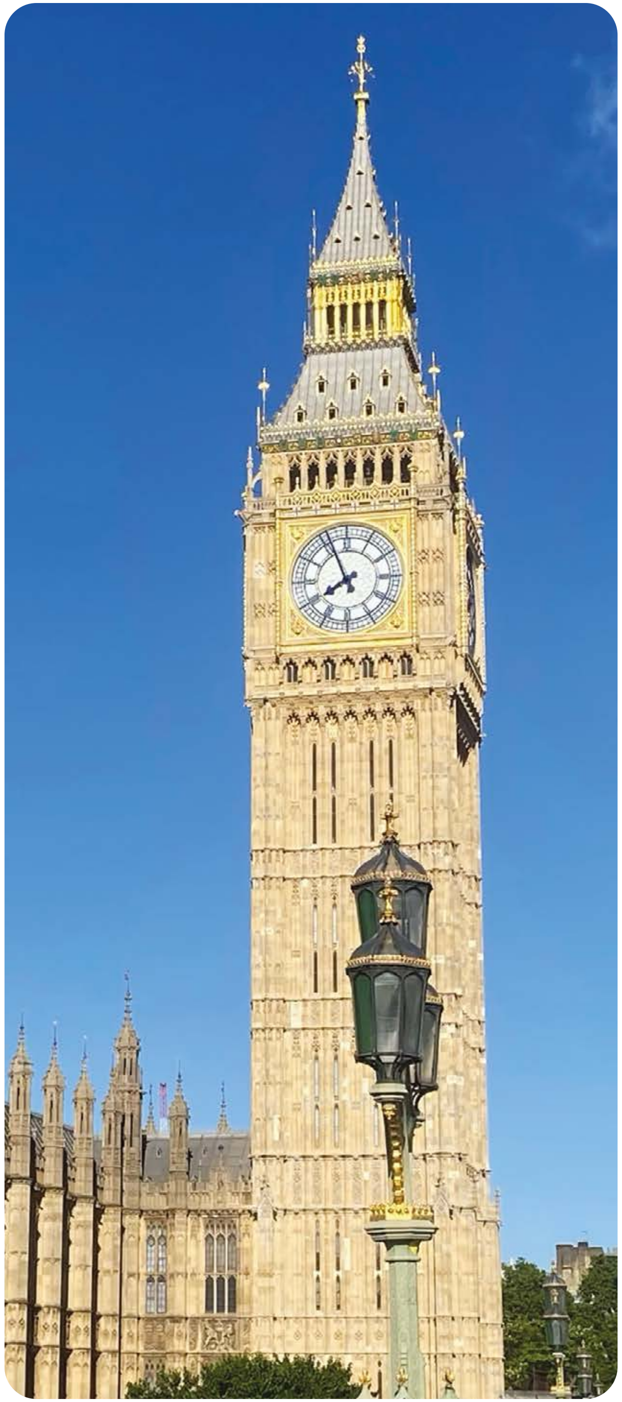
Alex McDowell, Director of Fundraising, Duke of Edinburgh International

Positioning legacies in national philanthropy initiatives

Working closely with sector partners, we positioned legacy giving at the core of key philanthropy initiatives, such as the National Philanthropy Strategy, ensuring this vital income stream is recognised by leaders and policymakers. We invested in research into high value legacies to demonstrate the appetite for legacy giving amongst wealth holders, and its potential for generating sustainable income for the future.

Strengthening legacy cultures and investment

Within the charity sector, we engaged leaders and decision-makers with the importance of investing in legacies, even during challenging economic times. This included speaking at sector events and hosting a dedicated webinar for trustees, designed to build their understanding of legacy income and their buy-in for legacies internally. We also developed a new toolkit and resources designed to help fundraisers make the case for legacy investment.



Supporting our members

Growing membership featuring
25+ causes

30,000
unique web user visits to our Find A Charity directory

Expanded member services:
Legacy Festival, training and more

2025 was a year of celebration for our membership community as we marked one quarter of a century of sector collaboration to grow the legacy market.

As such, we upscaled our member services to deliver an exclusive one-day Legacy Festival, on-demand legacy training, new insights into the legacy market, and more – all with a focus on helping members grow their legacy income and expertise.

With a membership that spans more than 25 causal areas, Remember A Charity represents a diverse and growing membership of charities of all sizes and causes, including a broad representation of local, community-based charities.

Amplifying members' legacy messaging

Members were pivotal within our consumer activity across the year, as we shared their legacy stories, case studies and messaging through our digital channels and media outreach, helping them reach and engage new supporters. Our consumer campaigns drew hundreds of thousands of visitors to the campaign website, with record levels of traffic (30,000 visits) to our Find A Charity section, featuring only member charities.

Remember A Charity Week remains a peak moment to maximise our collective impact and equip members to make the legacy message their own. In 2025, we transitioned our personalised Will You campaign assets to Canva, making it easier for members to customise campaign materials and engage both external and internal audiences with their legacy message.

5. OKO / Remember A Charity, Stages of Change Report 2026 6. Savanta / Remember A Charity, High Net Worth Legacy Study, 2025

Equipping members for legacy success

By investing in new insights into the legacy market, developing practical resources and opportunities for peer learning, we continue to help members strengthen their legacy fundraising, reach new audiences and build sustainable long term legacy income.

From our annual consumer benchmarking study of the UK legacy market[5] and its accompanying suite of legacy personas to our inaugural study into the high value legacy market[6], our research provided members with in-depth and actionable insights to inform and strengthen their legacy strategies.

Connecting & learning together

In 2025, we delivered 12 in-person and online exclusive member events, including the Legacy Festival, which provided valuable opportunities for members to share ideas and practical insights to strengthen their legacy programmes.

We introduced a new on-demand legacy training programme, toolkits and resource packs for our members, while our Legacy Bulletin, marketing and PR programme bolstered legacy knowledge across the sector more widely.

"Collaboration is at the heart of Remember A Charity and being part of the consortium helps us not only accelerate market growth, but it gives us a powerful collective platform to champion legacy giving. As a member, we benefit enormously from shared insight, sector learning and lobbying power. Ultimately, this means we can make an even bigger difference for the communities we serve."

Kerry McMenamin, Head of Public Fundraising at Christian Aid

“As we move forward with a new strategy and vision for the future, our ambition is clear: to accelerate the growth of charitable legacies across the UK, strengthening the sector’s resilience and ability to meet the evolving needs of beneficiaries. Working collectively, we can reach and inspire more supporters to leave gifts that will the shape the world to come. Our members will always be at the heart of our work, as we share learnings and equip them with the resources, insight and confidence they need to succeed with their legacy programmes.”

Lucinda Frostick, Director of Remember A Charity

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Stronger Together

Together, we can create a future where everyone feels inspired and empowered to leave the world better and stronger by remembering the charities they care about in their Will.

REMEMBER A CHARITY IN YOUR WILL

Help the work live on...

Remember A Charity is a consortium of close to 200 charities working to grow the UK legacy giving market and to support charities with their legacy fundraising. The annual Remember A Charity Week is held in September, serving as a platform for member charities to champion gifts in Wills. The consortium also runs high profile consumer campaigns all year round, while working with legal partners and Government to nurture the wider legacy environment.

Visit: **remembercharity.org.uk**
Contact: **info@remembercharity.org.uk**

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Remember A Charity is part of the Chartered Institute of Fundraising, which is incorporated by Royal Charter (RC000910) and is a charity registered in England and Wales (No. 1188764) and Scotland (No. SC050060)