Legacy Fundraising Ten Top Tips

1. Don’t be afraid to talk to supporters about leaving a legacy – speak with confidence and normalise legacy giving.

2. Ensure all staff, trustees and volunteers are confident with talking about legacies. Don’t assume that because you are small organisation you can’t ask for legacies.

3. Remember legacy fundraising is a long-term strategy and that you might not see immediate results.

4. Make sure supporters understand legacy giving and the jargon surrounding it.

5. Make sure your message is always ‘family first’. Many charities use language such as ‘after providing for your loved ones, please consider leaving us a share of what is left’.

6. Create simple ways to give, with clear information on your website.

7. Tell a story. Make it clear how a legacy gift will help your organisation in the future.

8. Talk about legacies in your newsletters, ebulletins and on social media.

9. Look at national charities legacy pages to get some ideas.

10. Hold/Support promotional weeks. For example, offer a free will writing service if supporters agree to leave a legacy.