

include a charity
Help the work live on.

WEBINAR SERIES

INTERNATIONAL TRENDS IN GIFTS IN WILLS

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CAMPAIGN DIRECTOR

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Fundraising Institute Australia

Where it all began ...

1993 – Diana Newman and colleagues of Columbus Foundation.
Created Leave a Legacy (North America)

Why ...

UK's Remember a Charity says it best: "To do what no single charity has ever been able to achieve on its own: make legacy giving a social norm."

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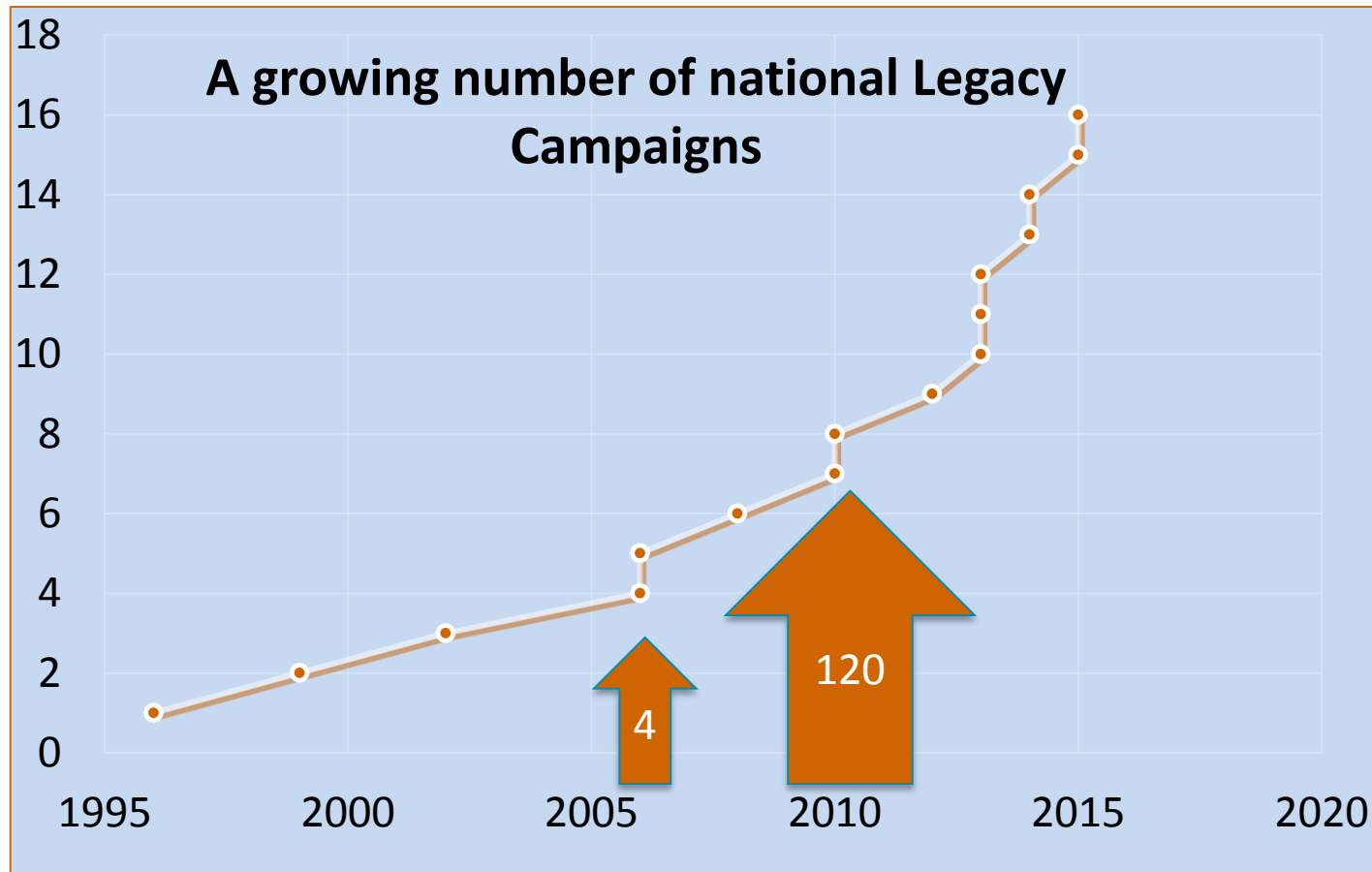
LEGAVISION

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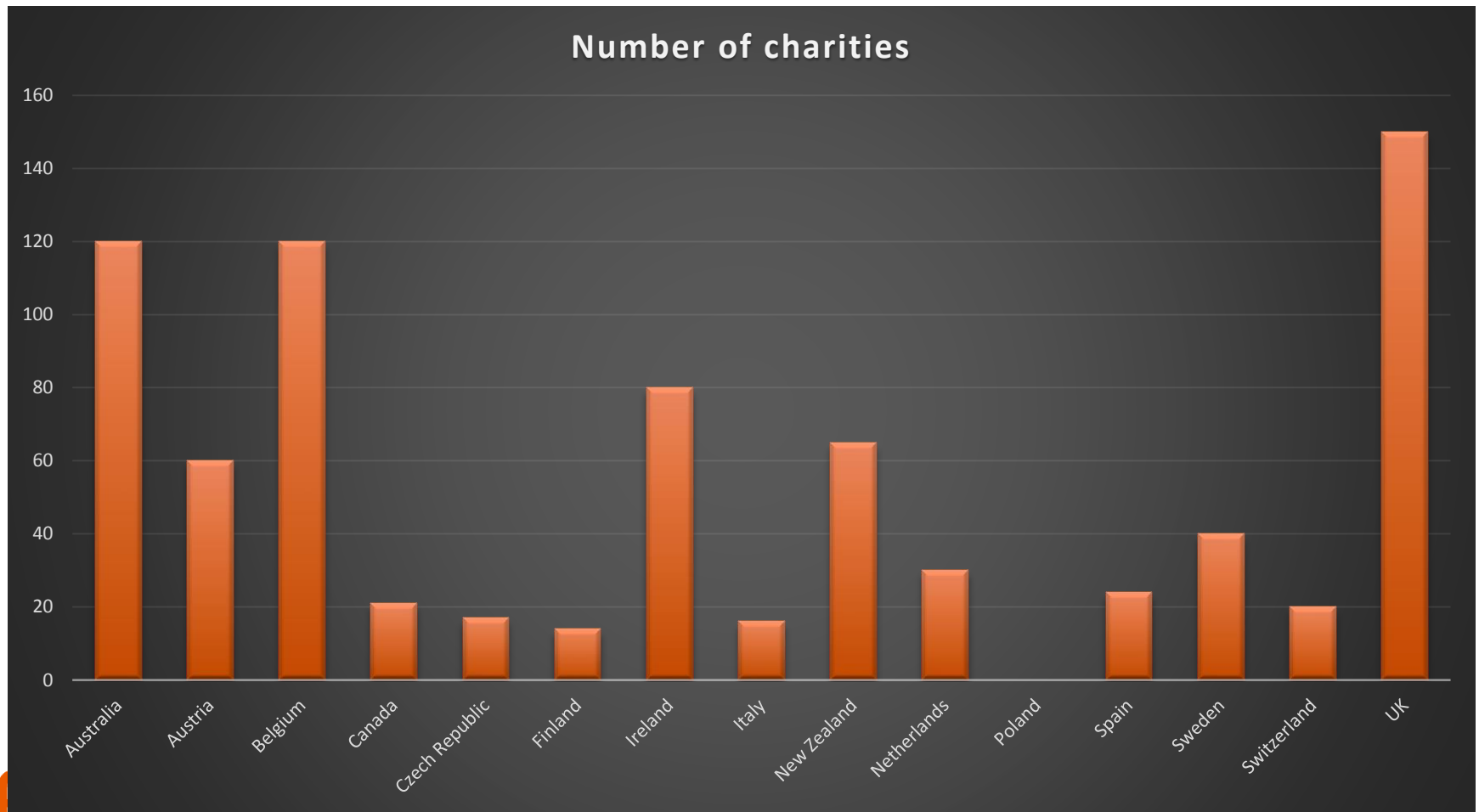


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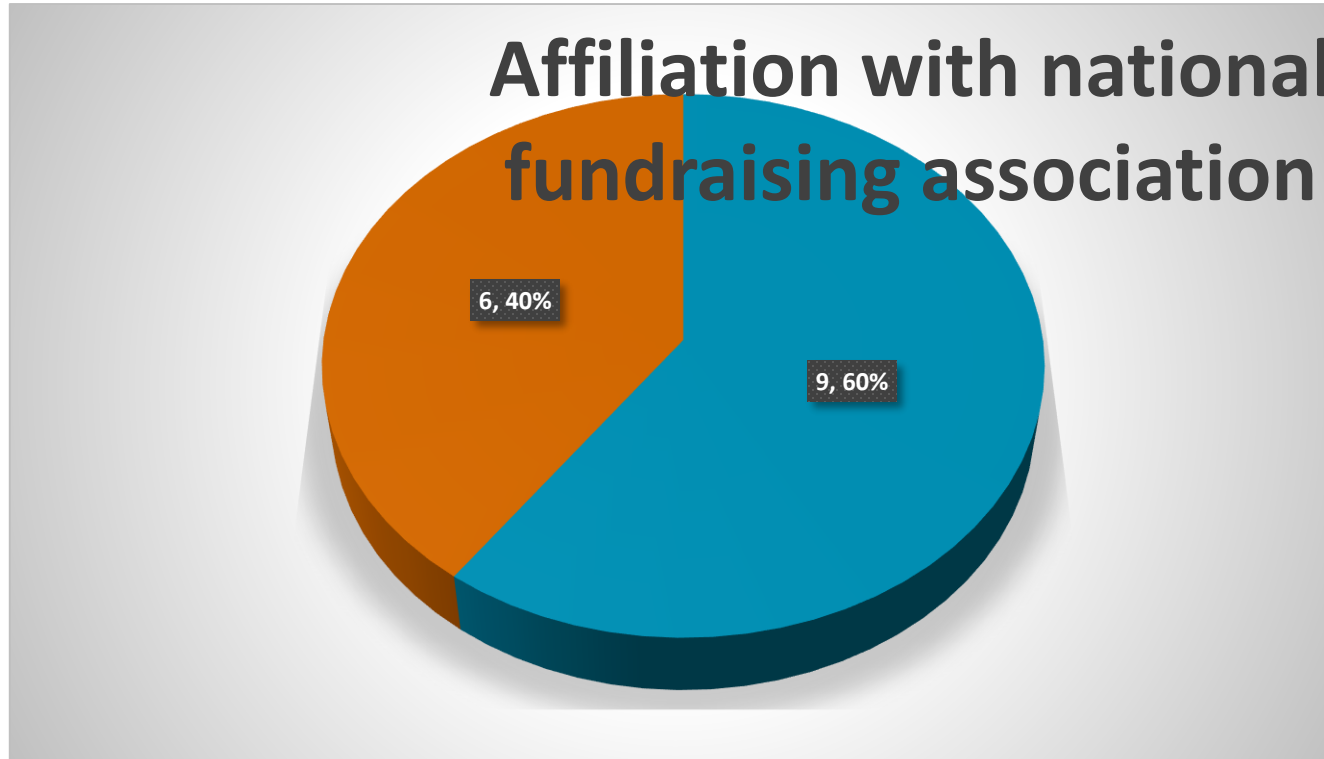
More and more National Campaigns



Worldwide almost 1,000 charities involved

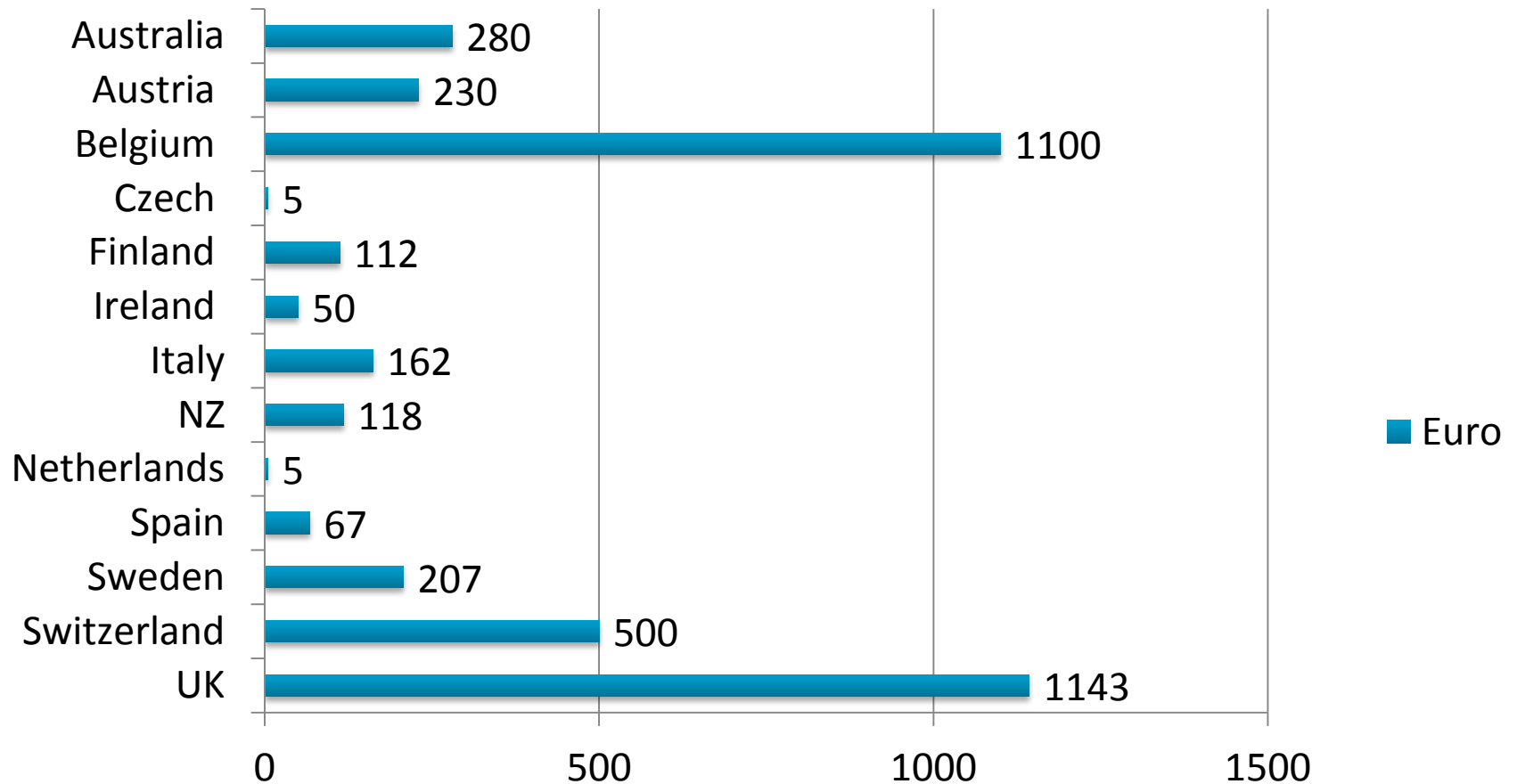


Organisational affiliation

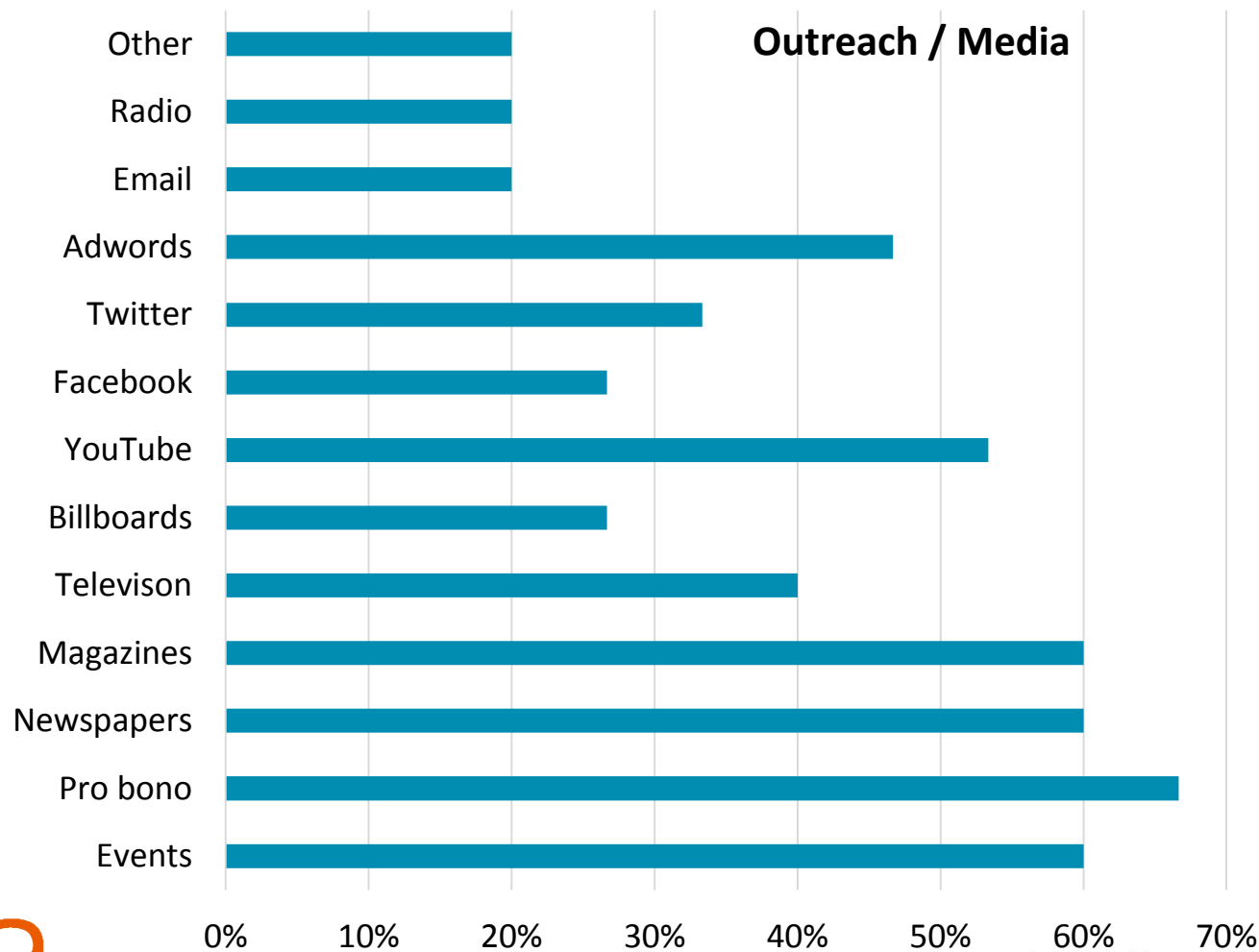


60% is affiliated, 40% not connected

CAMPAIGN BUDGETS ('000 Euro)



Media strategies



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UNITED STATES



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The campaign in the US

Campaign: Leavealegacy.org

Organisation: Partnership for Philanthropic Planning

Organisation website: ppnet.org

Commenced: 1993

Structure: Rolled out via volunteers in the Partnership-affiliated planned giving councils

Giving in US

Fact	Value	Source
Population	323 million	US Census Bureau
Number of deaths	2,596,993	National Center for Health Statistics
% population giving	67% of households	Nonprofit Almanac
Value of donations	358bn (2014)	Giving USA
% Popn leaving Gifts in wills	8% (2014)	Giving USA
Value of bequests	\$28bn (2014)	Giving USA
Average gifts in wills	\$32,000	Guidestar
Top organisations receiving support	Religious Congregations (33.4%) Education (14%) Human Services (9.7%)	Giving USA

Campaign materials



Carpenter Dominic Mason died in 1989.

Tomorrow, he'll renovate the playroom at the local homeless shelter.

As a carpenter, Dominic renovated homes for his clients. As a child, he and his mother found a home in a shelter when times were hard. A carpenter, they showed Dominic a future filled with opportunity, and he never forgot the life-changing vision.

Thanks to a bequest to his will, a few more children will have a chance to build their dreams. Local charity work in your will or estate plan. Contact charitable organizations, attorney, financial advisor or local LEAVE A LEGACY® program to learn how.

LEAVE A LEGACY®
Make a Difference in the Lives that Follow
www.leavealegacy.org

Ralph Peterson was buried beside his favorite fishing hole in 1997.

This Saturday at 2 p.m., he'll release a hundred bluegills into its waters.

Ralph was happy along with a good catch, making the thought to fish. To keep the good tradition for his grand-children, he included a bequest to a local conservation organization in his will.

Thanks to Ralph, the fish are still being "caught" your favorite cause in your will or estate plan. Contact a charitable organization, attorney, financial advisor or local LEAVE A LEGACY® program to learn how.

LEAVE A LEGACY®
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Dr. Marjorie Chun died in 2000.

This fall, she'll build a chapel in the hospital where she worked.

Dr. Chun practiced the science of medicine, but she was also a woman of faith. To help her hospital treat body and soul, she funded the new chapel with a gift in her estate plan. Thanks to Dr. Chun, patients and their families will have a place to seek peace. Include your favorite cause in your will or estate plan. Contact a charitable organization, attorney, financial advisor or local LEAVE A LEGACY® program to learn how.

LEAVE A LEGACY®
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Campaign material

LEAVE A LEGACY®
March 15, 2016

Make a Difference in the Lives that Follow

About LEAVE A LEGACY®
Why Give?
How to Give
Donor Stories
Media Center
Get Involved

Welcome!

LEAVE A LEGACY® is a public awareness campaign designed to inspire people from all walks of life and all income levels to think beyond their lifespan when doing good works. Imagine how much good could be done if each one of us remembered a favorite charity or cause in our will or estate plan? The impact would be immeasurable!

Donor Stories	Get Involved	Awareness Campaign
<p>Meet the generous individuals who are making a difference in the lives that follow through bequests to a favorite charity.</p> <p>Learn More ></p>	<p>The LEAVE A LEGACY® message is being shared in cities and towns across America. Get in touch with these dedicated volunteers!</p> <p>Learn More ></p>	<p>Take a look at this inspiring public awareness campaign. Print ads, posters, brochures, PSAs, and more are featured.</p> <p>Learn More ></p>

click to view psa

- Print ads
- Posters
- Billboards
- Bus cards
- Newsletter template
- Radio PSA
- TV PSA

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CANADA



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Giving in Canada

Fact	Value	Source
Population	36 million	Statistics Canada
Number of deaths	268,056	Statistics Canada
% population giving	84% (2007)	Statistics Canada
Value of donations	10bn (2007) / Ave \$437	Statistics Canada
Value of bequests	Est \$563m	IaC estimate
% Gifts in wills	4% (2004) increased to 7% today	Leavealegacy.ca
Average gifts in wills	\$30,000	Blackbaud
Top organisations receiving support	Religious Organizations (45%) Health (14%) Social Services (10%)	

The campaign in Canada

Campaign: Leavealegacy.ca

Organisation: Canadian Association of Gift Planners (CADP)

Organisation website: <https://www.cagp-acpdp.org/>


Commenced: approx 1993

Structure: 23 local programs under the CAGP roundtables

Campaign material

HOME | CONTACT US | FRANÇAIS | VOLUNTEER LOGIN

ABOUT LEAVE A LEGACY™	WHY GIVE	WHO GIVES	HOW TO GIVE	WHO CAN HELP	INVOLVE YOUR ORGANIZATION
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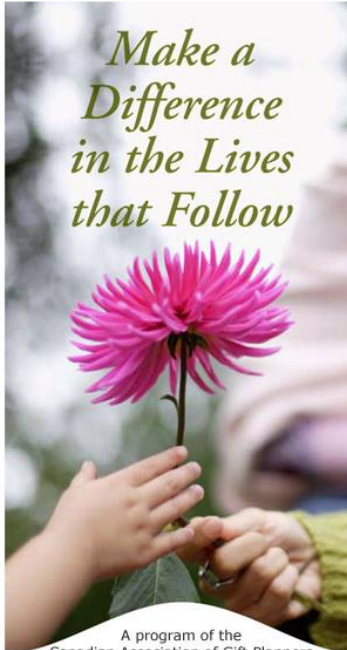
LEAVE A LEGACY™ is a national public awareness program designed to encourage people to leave a gift through their will or any other gift planning instrument to a charity or non-profit organization of their choice. LEAVE A LEGACY™ is a donor-oriented education campaign to raise awareness of the importance of including a charitable gift in the estate planning process. LEAVE A LEGACY™ is a program of the Canadian Association of Gift Planners (CAGP).

The LEAVE A LEGACY™ program goal is to raise awareness of the importance of thoughtful, well-planned, tax-preferred gifts and their impact on the quality of life for everyone in our communities.

LEAVE A LEGACY™ Public Service ↗

▶


Make a Difference in the Lives that Follow



A program of the Canadian Association of Gift Planners

TOP 10 THINGS You Can Do Today To LEAVE A LEGACY™

- 1 Prepare a will
- 2 Leave a gift
- 3 Be Specific
- 4 Consider assets
- 5 Name an alternate beneficiary
- 6 Existing life insurance
- 7 New life insurance
- 8 Memorial gifts
- 9 Encourage others
- 10 Ask your advisor





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UNITED KINGDOM



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Giving in UK

Fact	Value	Source
Population	64 million	
Number of deaths	501,428 (England & Wales) approx 575,000 in UK	Office for national statistics
% population giving	75% in past 12 months	CAF
Value of donations	£9.5bn	Charity Market Monitor
% Popn leaving Gifts in wills	7.3% actual (2013) / 17% claim to have left a bequest	RAC
Value of bequests	£2bn	RAC
Average gifts in wills	3 gifts per will	
Legal	65% of solicitors & will- writers 'always or sometimes' making the prompt	RAC

The campaign in the UK

Campaign: rememberacharity.org.uk

Organisation: Institute of Fundraising

Organisation website: <http://www.institute-of-fundraising.org.uk/>

Commenced: 2000

Structure: Central campaign. Team within IoF and ring-fenced funds

Campaign objectives

Our aim is that the percentage of Wills with a charitable gift will reach 16% by 2018. We will do this by focusing on the following four strategic pillars:

1. Raise awareness and relevance among the Will-writing public
2. Make charitable prompting the standard practice among professional advisors
3. Influence a climate for successful charitable Will-giving by working in partnership with individuals, government and private sector organisations
4. Help the charity sector to become more effective at promoting gifts in Wills

Campaign Material

The screenshot shows the homepage of the 'include a charity' website. At the top, there are navigation links for 'About us', 'Blogs', 'Contact us', and social media icons for YouTube, Facebook, and Twitter, along with a 'Login' button. Below this is a secondary navigation bar with links for 'Home', 'Making a Will', 'For charities', 'For solicitors and Will-writers', 'News', and 'Our partners'. A search bar is prominently displayed with the text 'Search for a charity'. The main content area features a large banner for 'PANCREATIC CANCER UK' with a quote: "Your legacy of hope will help us fund research & provide support to those with pancreatic cancer" and a 'find out more...' link. Below the banner are three circular icons: 'Why leave a gift Make a difference', 'Choosing the right charity Find a charity', and 'Find a solicitor or Will-writer Search by postcode'. At the bottom, there are two news snippets: one about leaving a gift in a will and another from the HM Government.

- Strong focus on PR & events
- Social media
- TV campaigns last updated 2009
- Collateral for RAC week – bookmarks, vinyls
- Posters
- Drive charity shop presence



Remember a charity – election manifesto

- 1. The next government to work with Remember A Charity and its partners in the public and private sector to achieve the goal of make legacy giving the social norm.**

Remember A Charity is also calling on any the next government to:

- 2. Design legacy giving incentives and benefits for all**

RAC calls on all parties to work with RAC to design and implement legacy giving incentives for individuals whose estates won't be affected by IHT

- 3. Increase levels of charitable prompting during the will writing process**

Remember A Charity calls on the government to work with Remember A Charity and its partners to make charitable prompting a standard part of all will-writing processes

- 4. Create a climate where employers promote will writing and legacy giving**

Remember A Charity calls for the government to work with Remember A Charity and its partners to encourage employers to provide their staff with a will

- 5. Promoting will writing and legacy giving through government communications**

Remember A Charity calls for the government to work with Remember A Charity to identify communications where it would be appropriate to promote will writing and charitable will writing.

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NEW ZEALAND



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The campaign in the New Zealand

Campaign: <http://includeacharity.org.nz/>

Organisation: Fundraising Institute of New Zealand

Organisation website: <http://finz.org.nz/>

Commenced: 2013

Structure: Include a charity trust with independent board to
FINZ

Campaign material

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[Home](#) | [About Us](#) | [News And Articles](#) | [Contact Us](#) | [Members](#)



[Leave A Gift In Your Will](#) | [Find A Charity](#) | [For Charities](#) | [Include A Charity Week](#) | [For Solicitors & Will Writers](#)



Leave something that will live on after you

Leave a gift in your Will to charity

Everyone has causes that they care about; a charity involving children, youth, the elderly, animals, the environment, community services, wellbeing and/or health.

Have you ever thought how easy it is to leave something to your favourite charity in your Will?



Bequests, or gifts to charities, are for everyday people!

It's a common misconception that only wealthy people leave money to charity when they die. Bequests in wills are not just made by the rich and famous! The reality is that most bequests are made by ordinary, hardworking people who want to make a positive difference to their community and other people's lives after they've gone.

Keep on supporting

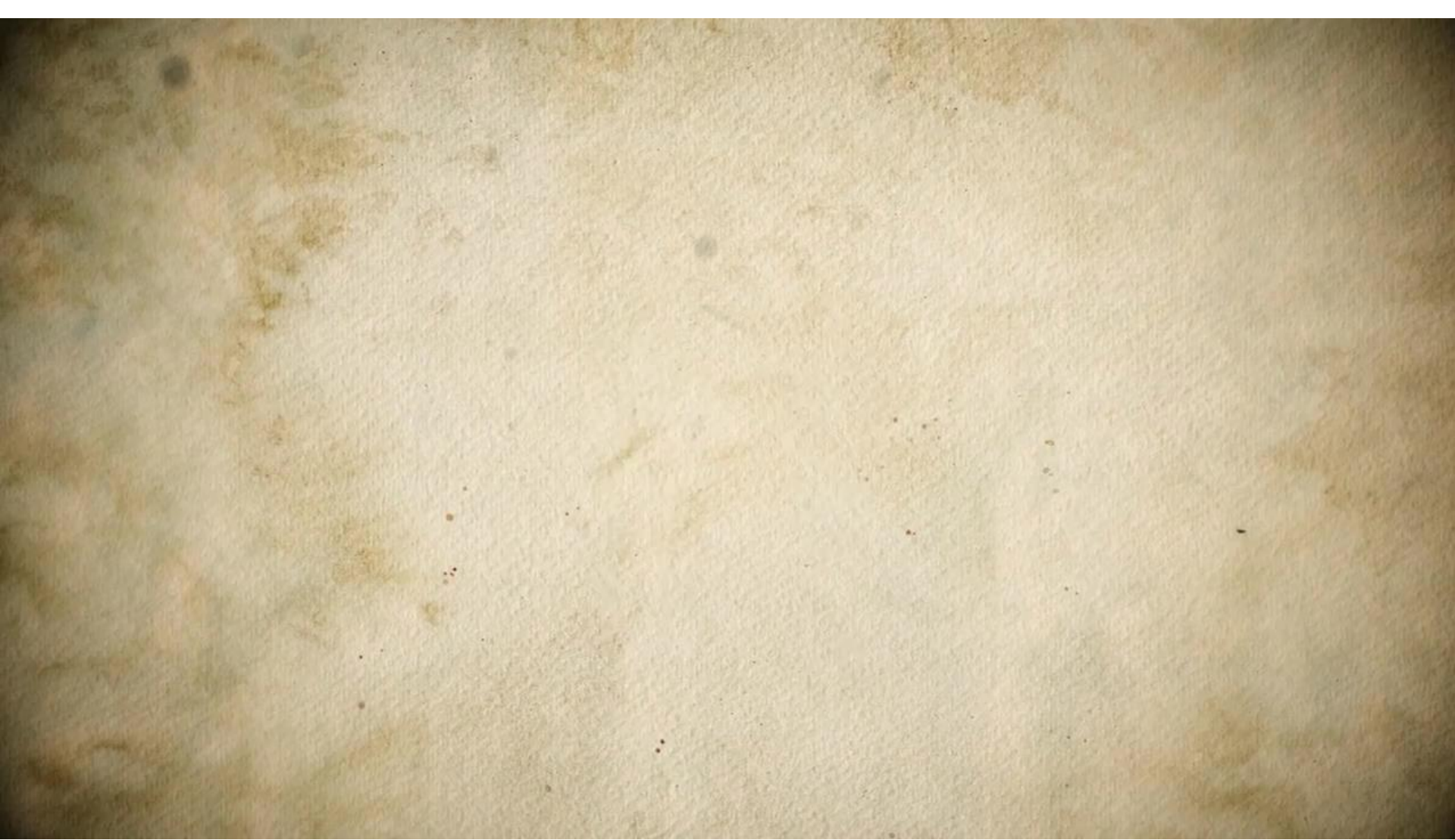
The simple fact is that without the generosity of these normal, everyday New Zealanders, many of the charities we know and support wouldn't even exist.

SEARCH SITE



Tweets by @IncludeaCharity





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AUSTRALIA

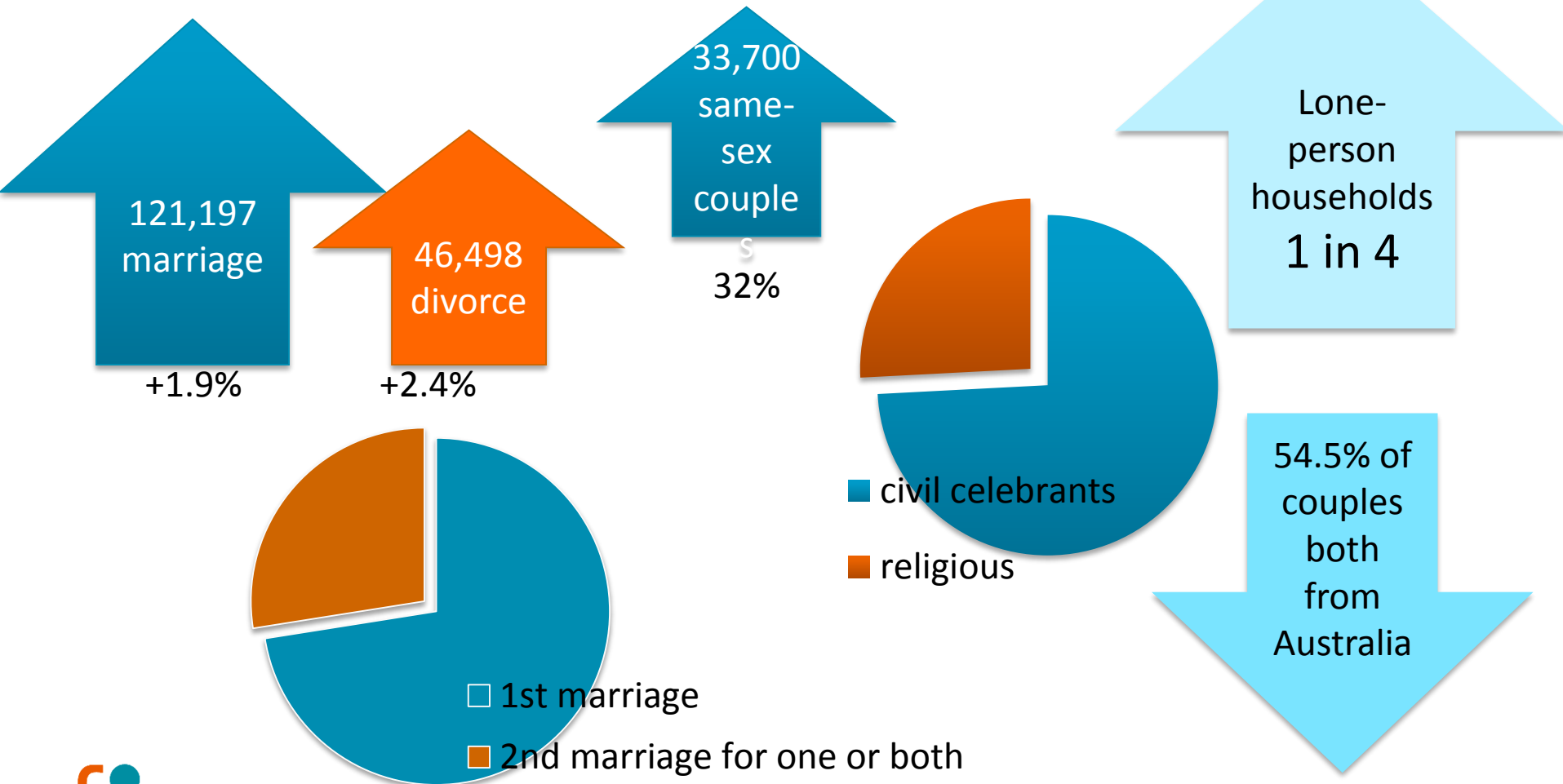


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Giving in Australia

Fact	Value	Source
Population	23 million	ABS
Number of deaths	153,580 (92% with will)	ABS
% population giving	87%	Giving Aust
Value of donations	\$6.8bn	ACNC
% Popn leaving Gifts in wills	7.5% / 12% claim to have left a bequest	Giving Aust / IaC
Value of bequests	\$690m (est)	IaC
Average gifts in wills	\$60k	Pareto/IaC Benchmarking
Legal	40% are likely to ask their clients	IaC

LIFE IS CHANGING IN AUSTRALIA



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AUSTRALIA - ABS 2014 - <http://www.abs.gov.au/ausstats/abs@.nsf/mf/3310.0>

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Target market

Over 65

Women

No children

Positive attitude to charity

Stable

Asset rich (may not think so)

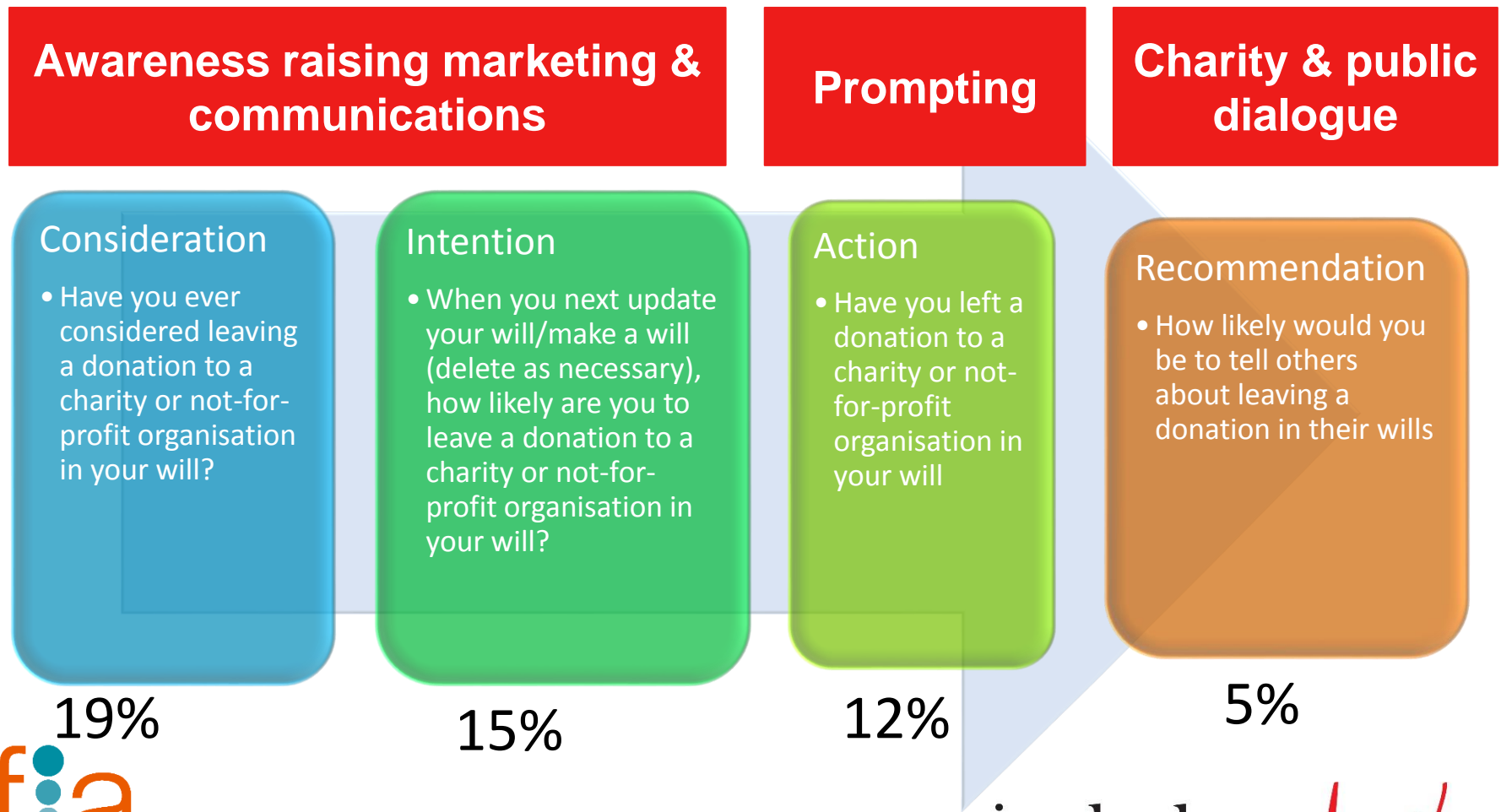
Statistics

- 91% of the population over 65 has a will
- 13% of Australia population is aged 65+. **By 2051 this will be 25%**
- 45.6% of females aged over 65 are widowed
- 160,000 childless women over the age of 65 currently lowest in 100 years. **This will be 600,000 by 2051**
- By 2051 there will be 9 million Australian over 65

International summary

Country	US	Canada	UK	Aust
Value	28bn	560m	£2bn	690m
Pop'n	323m	36m	64m	23m
\$/head	\$87	\$15	£31	\$30

Role of sector campaigns



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THANK YOU

KAREN ARMSTRONG
CAMPAIGN DIRECTOR
FIA

UPCOMING EVENTS

FOR MORE INFORMATION AND TO REGISTER VISIT WWW.FIA.ORG.AU/IAC

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