



*Plant a seed*  
**TODAY...**  
*Change the world*  
**TOMORROW.**

LEAVE A GIFT IN YOUR WILL. INCLUDE A CHARITY.

# Unlocking the Power and Potential: A National Study of Bequestors


Include a Charity 2025

Fundraising Institute of Australia

Presented by Nick Jaffer, President & CEO (Asia Pacific)

Global Philanthropic





Global Philanthropic would like to acknowledge the traditional custodians of the lands on which we live and work, and recognise the importance of the knowledge, wisdom and culture of Australia's First Nations' peoples.

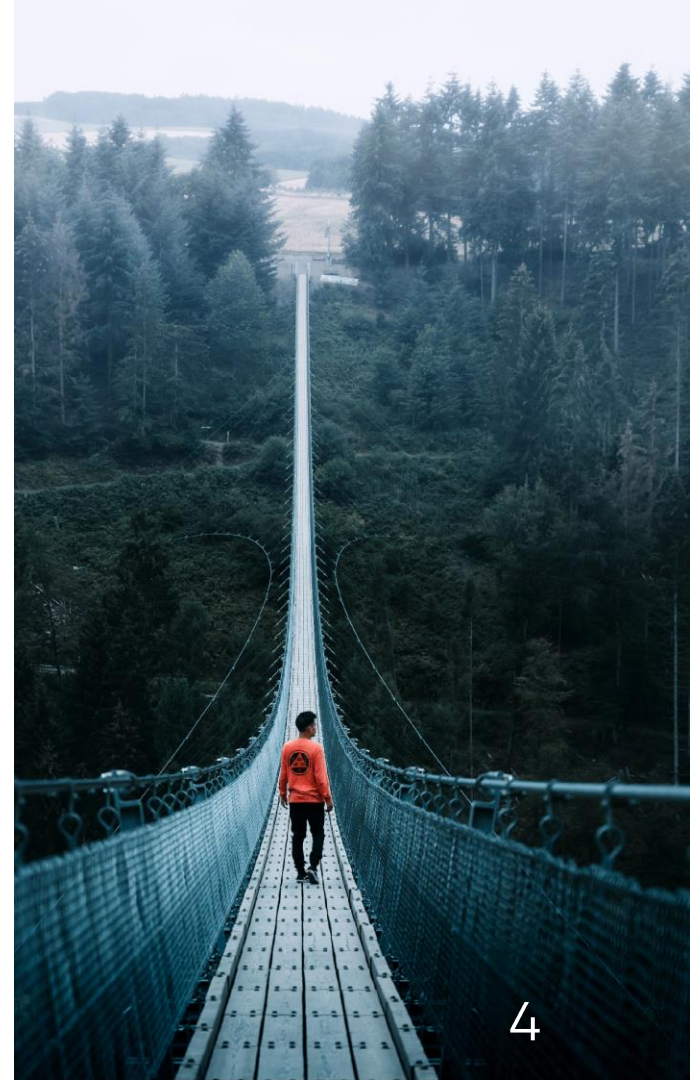
01

# Overview



# Study Overview

- **51 Interviews (52 participants)**
- **Inspiration:** What prompted them to consider a gift in their will?
- **Decision-Making:** Choices around causes/charities and restricted/unrestricted GIWs
- **Challenges:** What barriers/impediments, if any, did they encounter during their decision process?
- **Donor Journey:** Experience with organisations, willingness to bring forward their GIW
- **Allocation:** How did they determine the specific amount or residual to include in their will? How important is it to them to leave an inheritance?
- **Family Involvement:** To what extent have family been part of the conversation before or after the above have been made?



# Resourcing

- Staffing gaps and changes
- Under-resourced
- Feedback from interviewees
- Impact on relationships
- Potential loss of support





# Fundraising Return on Investment

Return on a \$1 investment for different types of fundraising activities, as reported by Australian non-profits



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## Findings and Observations



# Inspiration

Anthony

Fiona

Belinda

Gary

Beryl

June

Bernie

Peter

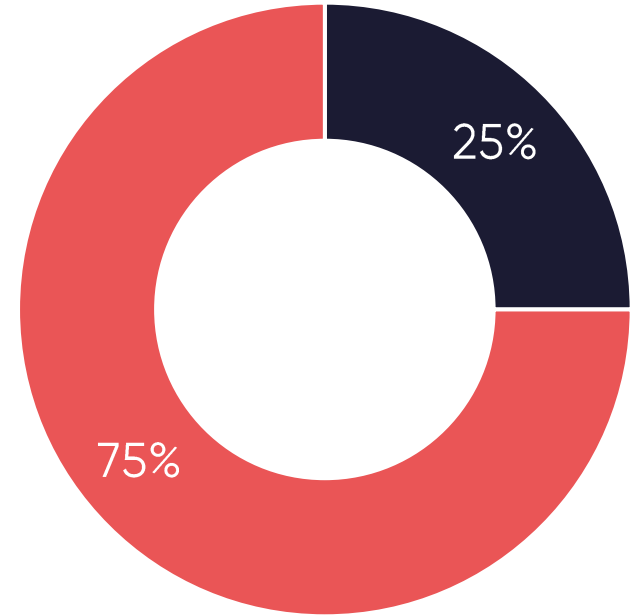
Candice

Tina

David



# Gender

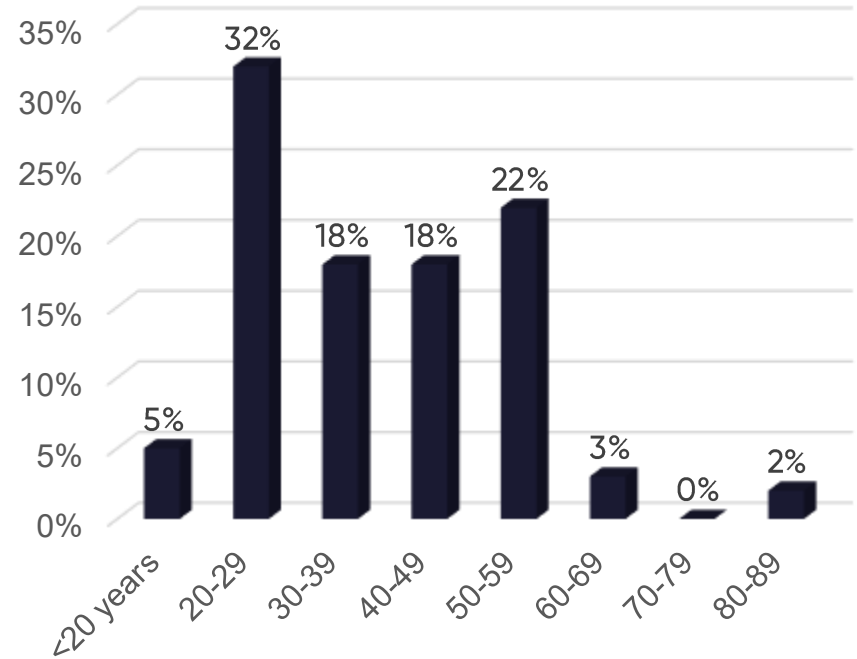


■ Male ■ Female

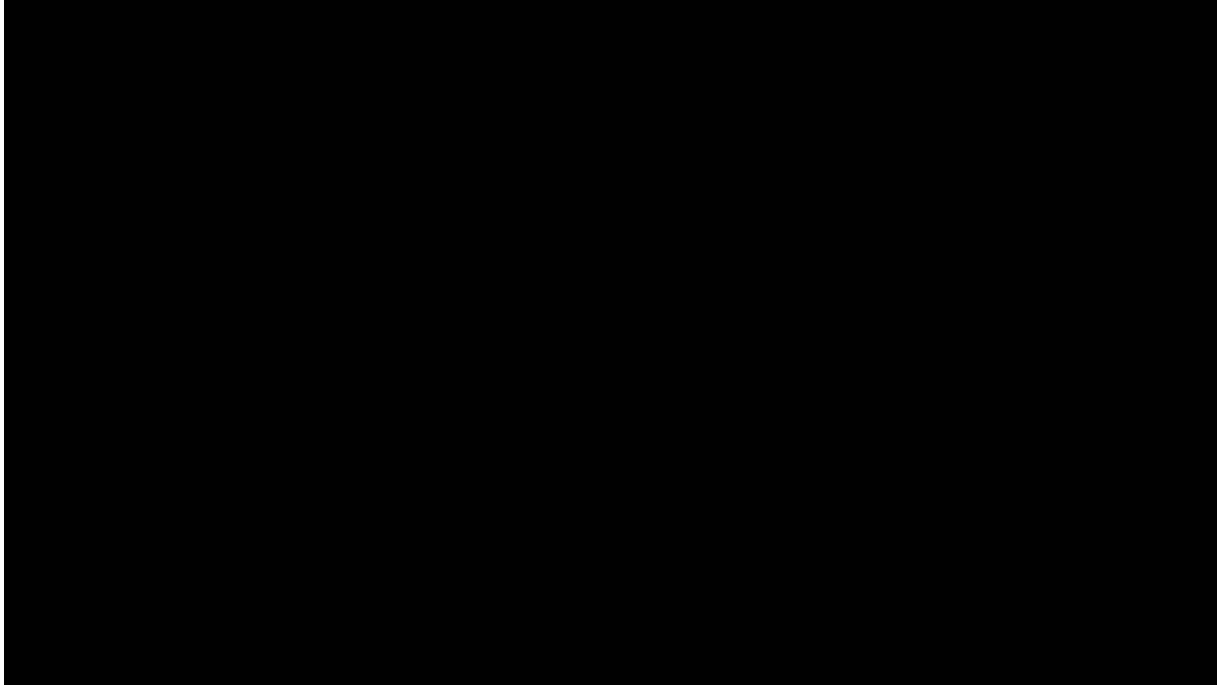


- Organisations typically over-invest in marketing to 60+
- Dilemma of realisation and timing
- Peak income/asset period
- Gen Z trend – willingness to consider including a charity

## Age – First Will



When did you write a will, and why?



# Experience of writing will



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Straight-forward/Practical

- Part of life event
- Administrative task
- Few information barriers
- Solicitor-supported



INCLUDE  
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Emotional/Stressful

- Confronting mortality
- Dealing with family complexities
- Coinciding with stressful times (e.g. illness, another death, property purchase, children)
- Difficulty understanding legal language
- Procrastination



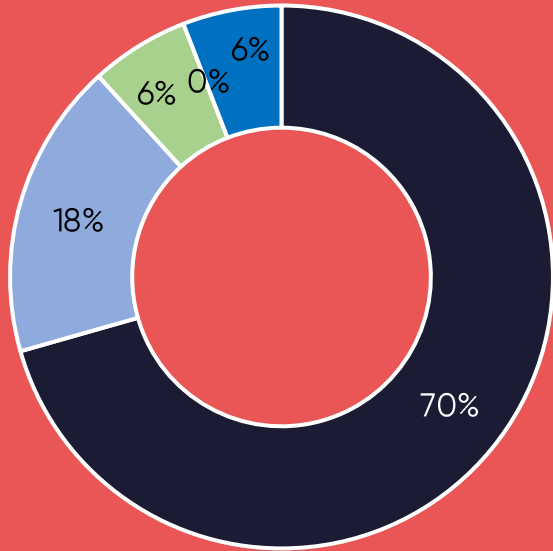
INCLUDE  
A CHARITY

Family/Values Driven

- Life changes often related to family (e.g. marriage, children, divorce)
- Connected to personal and family values
- Parental examples of support (though not through gifts in wills)

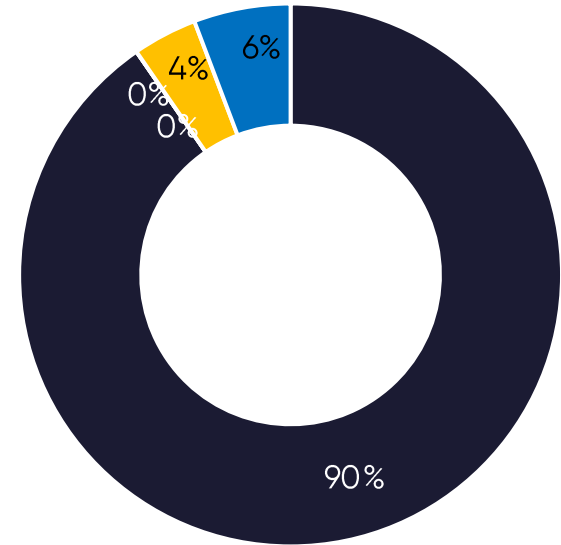


# Method – First Will



- Solicitor
- Did it themselves
- Will Kit
- Online
- Other

# Method – Latest Will



- Solicitor
- Did it themselves
- Will Kit
- Online
- Other



# Will writing

- Solicitors have a significant influence and provide a significant opportunity
- Online increasing but it doesn't fit everyone
- Will kits decreasing in use
- Doing it oneself often reflects lower assets



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# Donor Journey



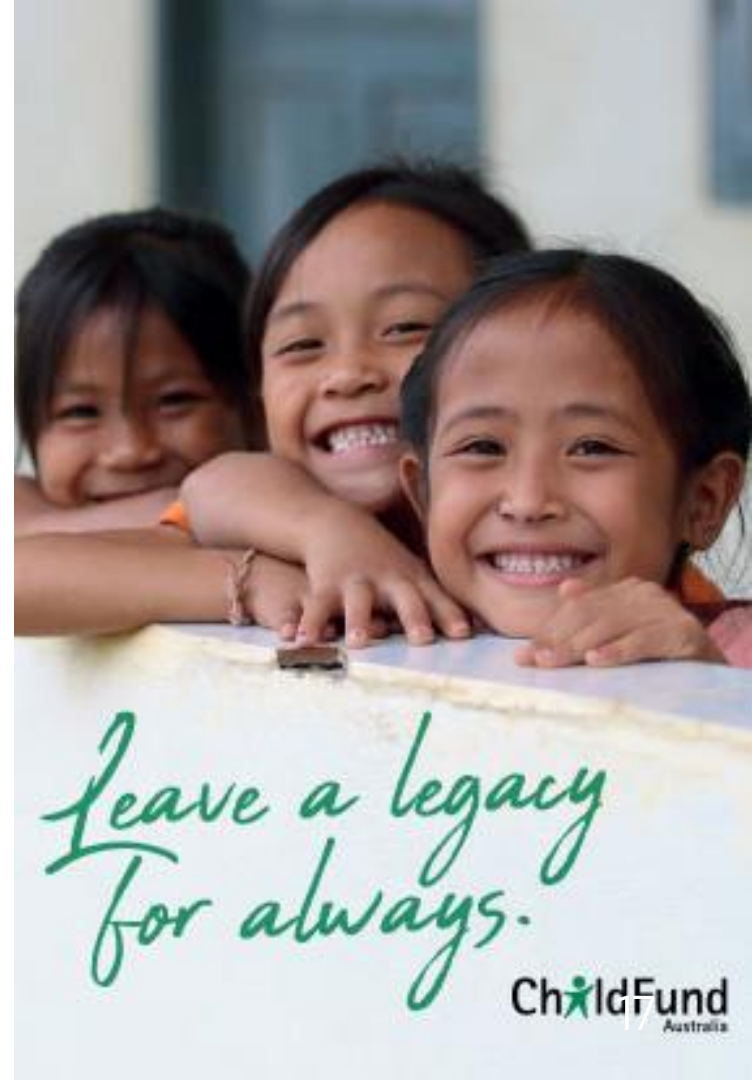
# Reasons for a GIW

- Strong personal connection
- Family influence
- Prompt by life events
- Increase in assets
- Prompt by solicitors and professionals
- Trust in organisations
- Alignment with personal values and desire to make an impact
- Influence of fundraising professionals?



# Online/Website information

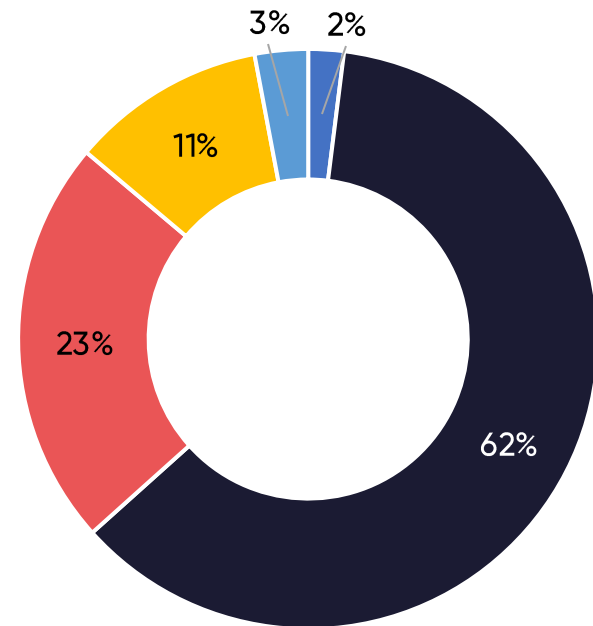
- Only 1-2 out of every 10 donors sought information on the leaving a gift in will on a website.
- If they did, it was for will clauses or guidance; sometimes their solicitor sought it.
- Overwhelmingly, interviewees indicated they knew who they wanted to add.



- Stewardship and engagement remains critical
- The number of reviews may be connected to age, however is not the primary driver
- Changes in family, life circumstances and interest/disinterest in charities has a bigger influence

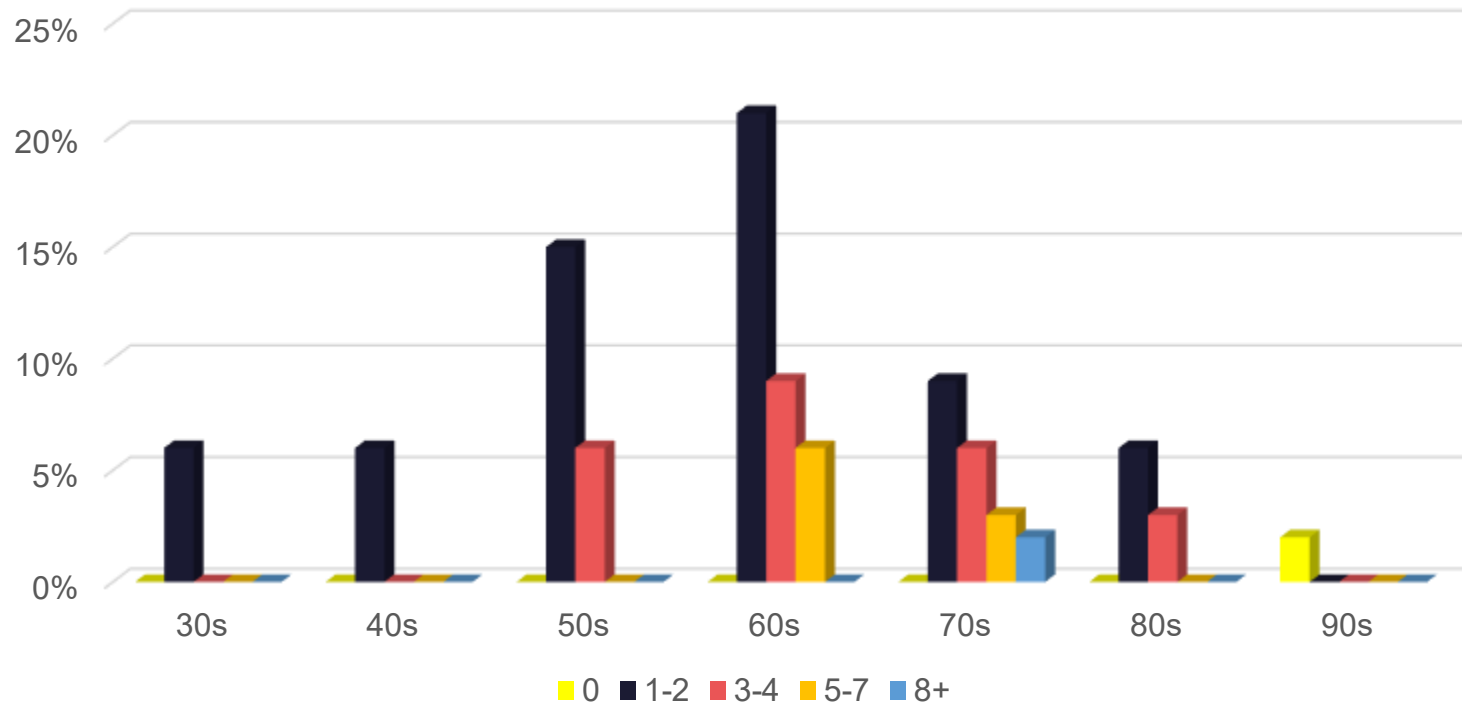


## Number of Updates



■ 0 ■ 1-2 ■ 3-4 ■ 5-7 ■ 8+

# Will Reviews/Updates by Decade of Age

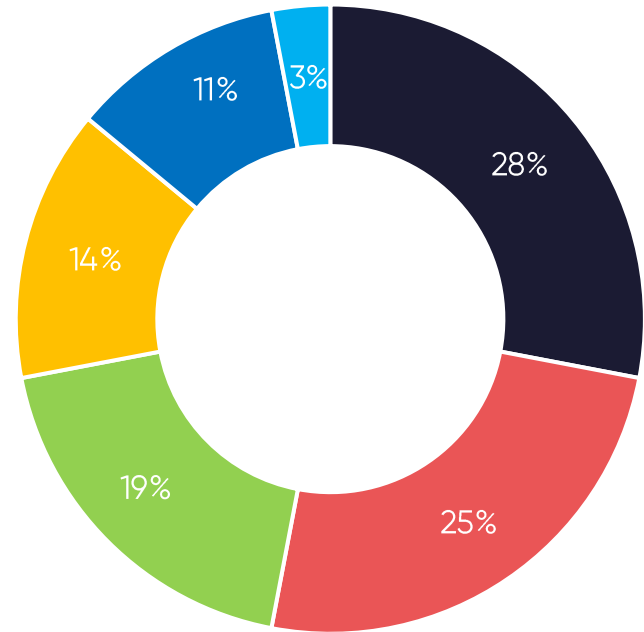


What has prompted you to review your will?



# Number of Charities

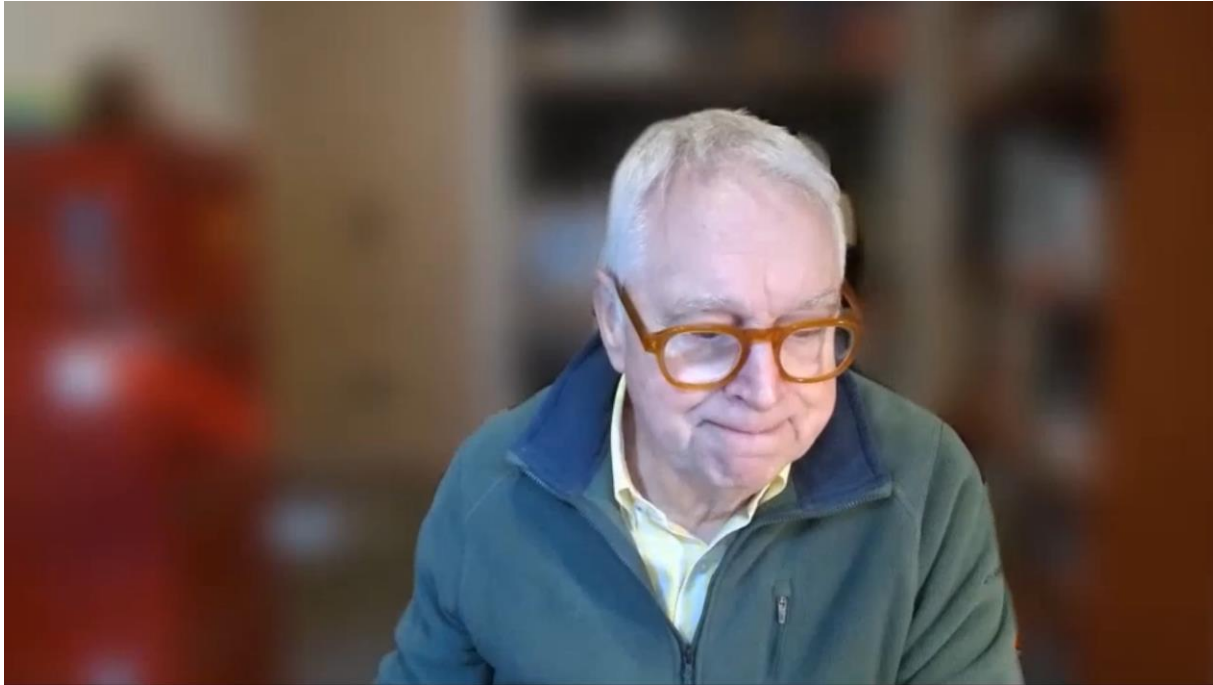
- 47% have more than 4 or more charities in their Wills
- You don't have to be their 'closest friend' but you have to be relevant
- Averages: Men - 5.6/  
Women - 3.4



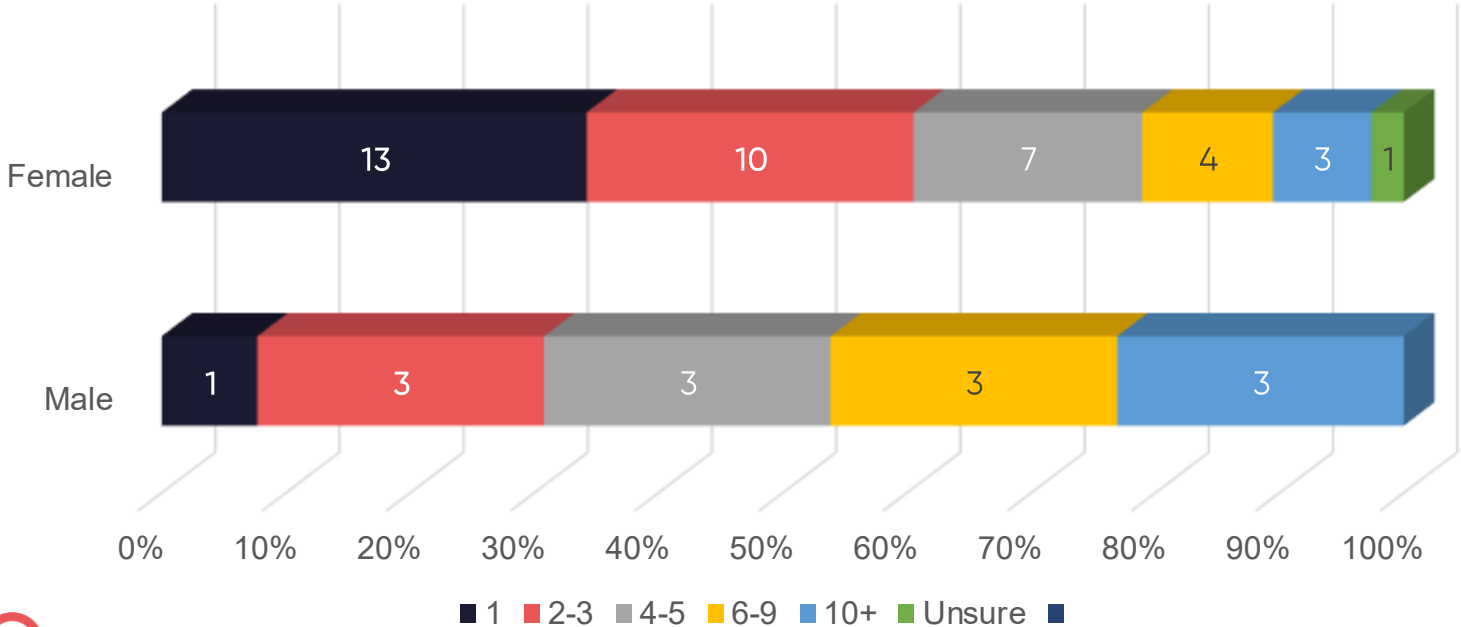
■ 1 ■ 2-3 ■ 4-5 ■ 6-9 ■ 10+ ■ Unsure



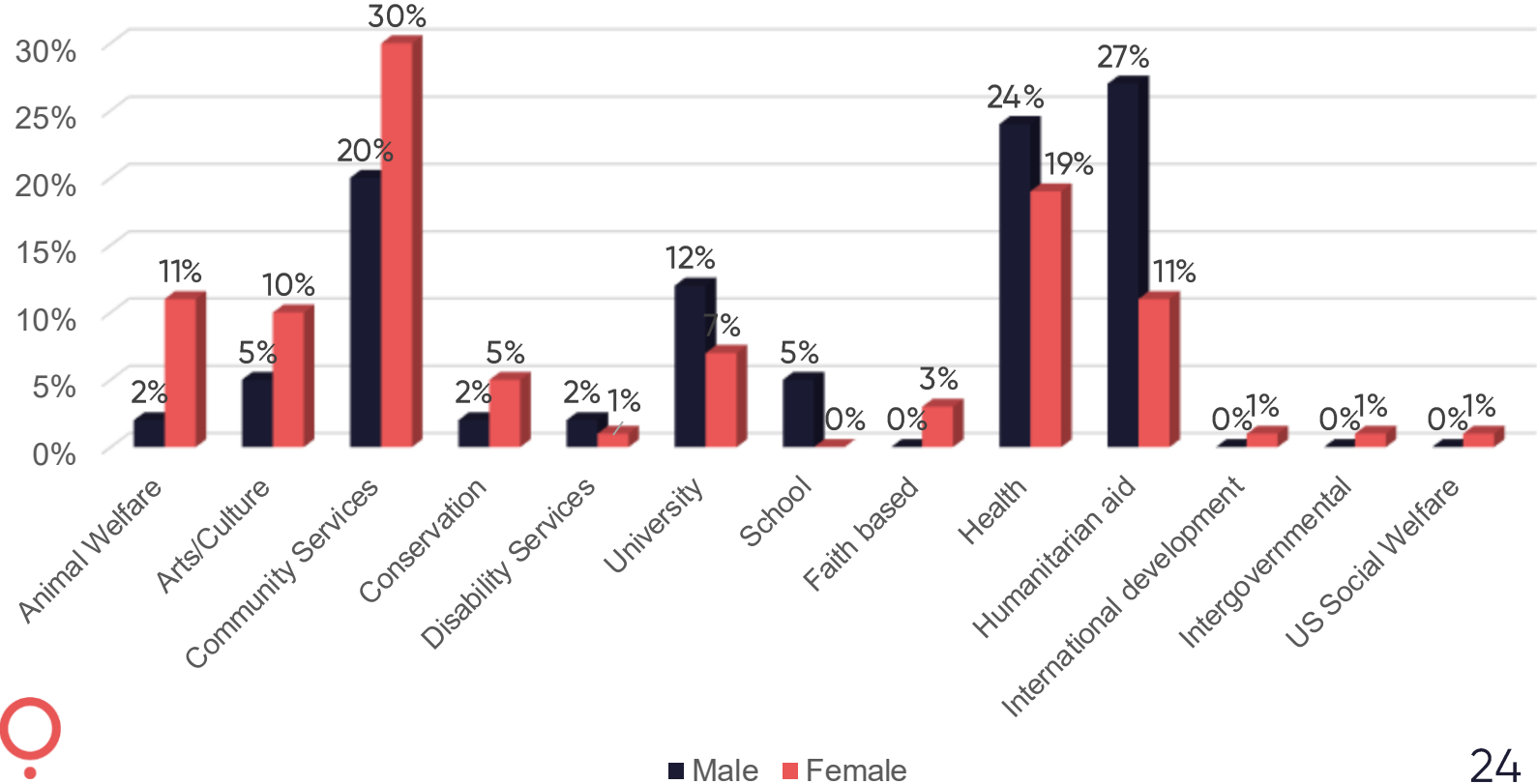
How many charities do you have in your will?



# Number of Charities by Gender



# Charity Types Supported



■ Male ■ Female

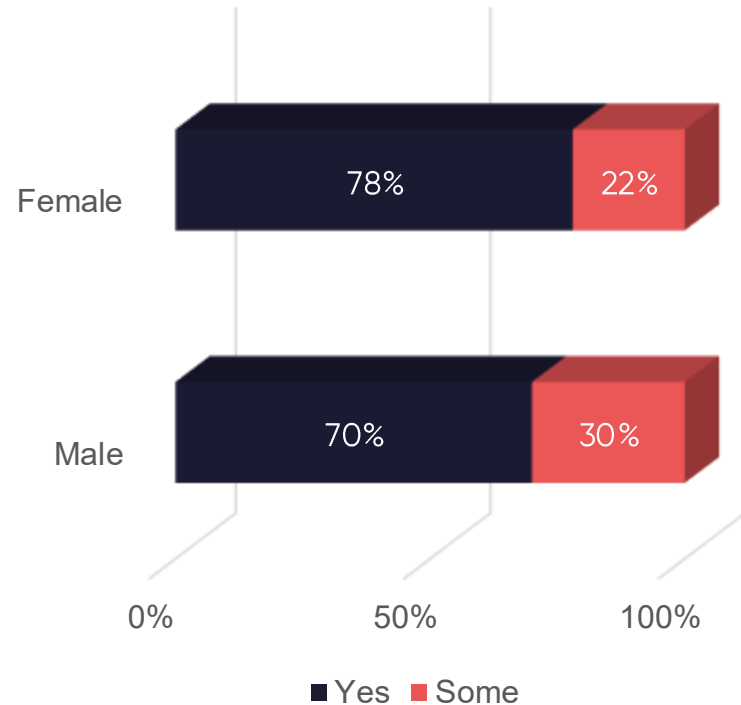
How did you choose the charities in your will?



- Operational mass tactics and personal contact
- Charities that have a closer a relationship with the bequestor are notified far more often.
- Larger charities have a higher perception of being 'too busy' to respond
- Charities that don't respond to notifications have a higher risk of removal



## Notifying Charities



How and why did you notify the charity?



How and why did you notify the charity?

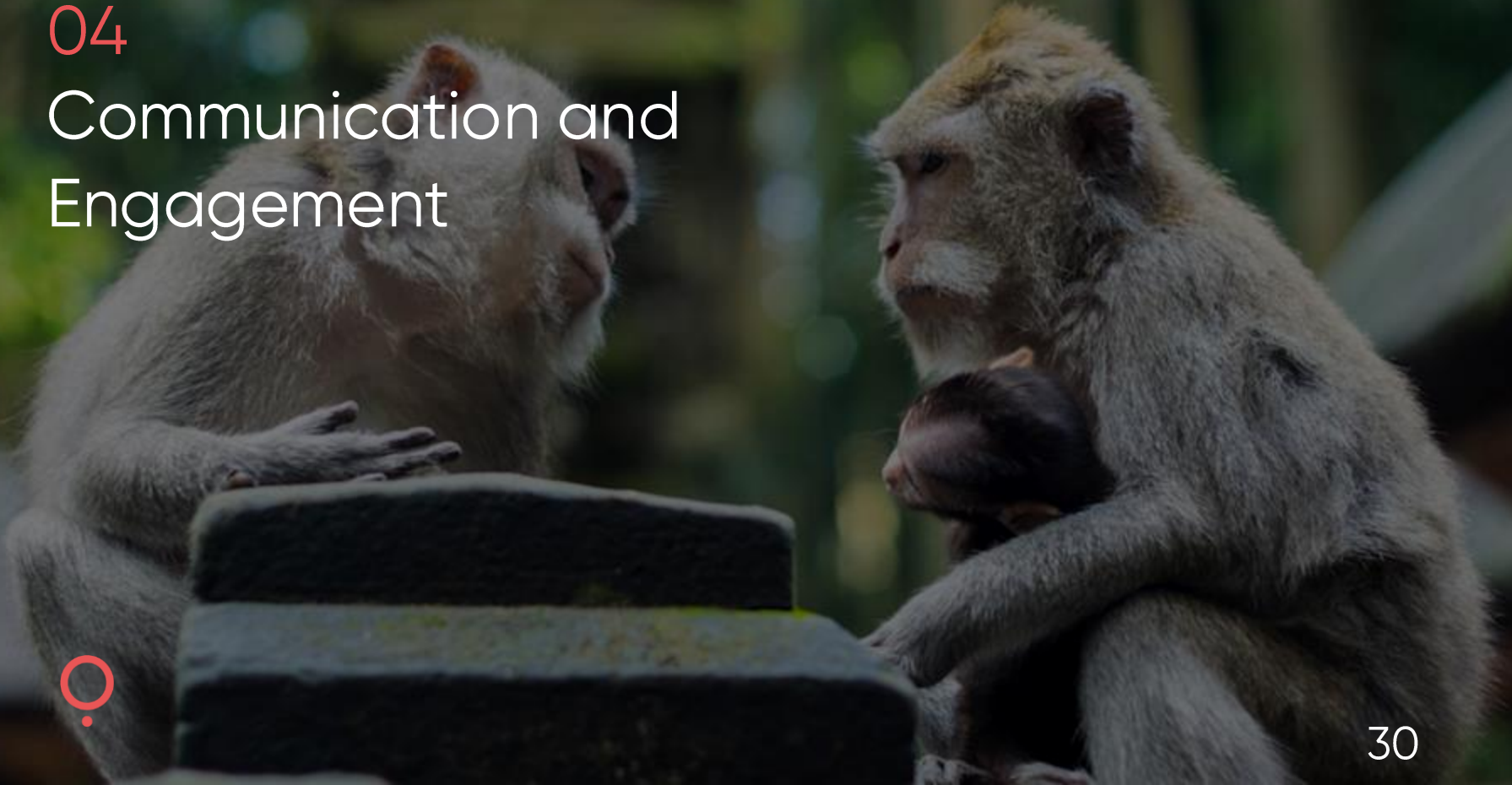


How and why did you notify the charity?



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# Communication and Engagement



# Communication

- Regular, informative and relevant updates
- Insight into impact
- Advance communications
- Personalisation and acknowledgement
- Concerns about printed communications and cost; prefer digital communication because it's perceived to be more cost effective
- Managing frequency and purpose



# Events and activities

- Smaller, intimate events rather than galas or large-scale events
- Information seminars, tours of facilities, meeting beneficiaries – seeing and hearing about tangible progress
- Location and accessibility
- Opportunities for deeper involvement and contribution
- Role of recognition societies



What type of events and activities do you like to attend?



# Engagement

- Personal and respectful, building genuine relationships
- Personal contact vs mass communications
- Feeling valued and included
- Gentle promotion, not pressure
- Transparency and trust



What's your experience been like as a supporter?



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# Trustworthiness



# Trustworthiness

- High levels of trust in organisations
- Communication and engagement
- Importance of strategic, well planned stewardship
- Long term relationship building
- Personal connection
- What risks losing support?
- What is your competition doing?

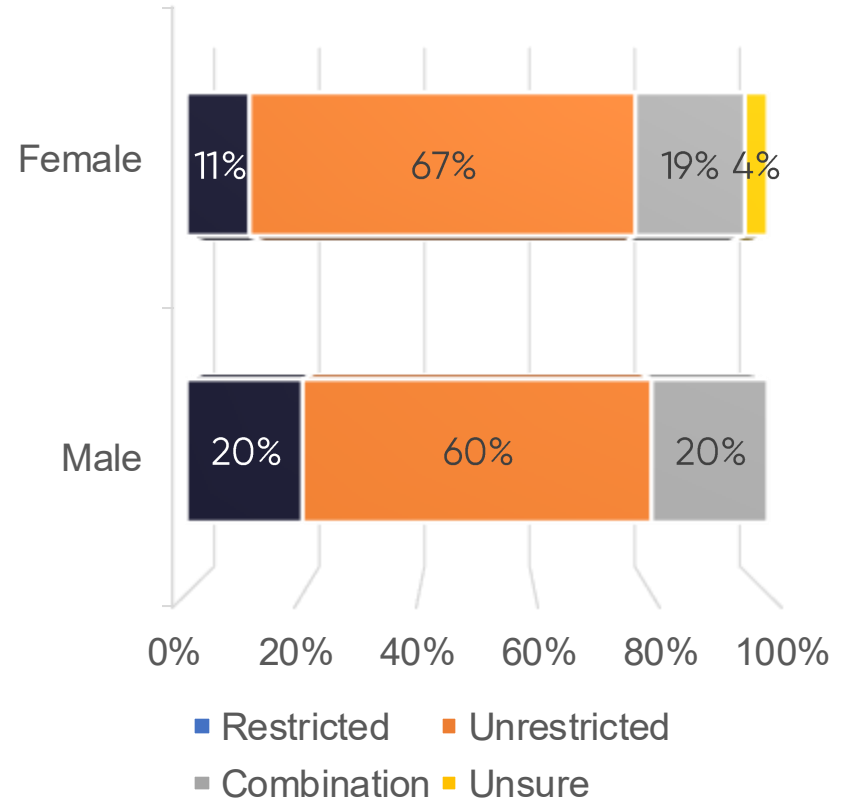


How would you characterise the trust you have?



# Restricted v Unrestricted

- Trust, previous experience and interests/needs influences the degree of restriction
- Restrictions include scholarships, medical/health interests, arts/culture interests
- Only a couple have had discussion about this with charitable organisations



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# Allocation



- There isn't a clear understanding amongst bequestors of the benefits of residual GIWs for either the donor or for the charity
- Few bequestors have been approached about residual bequests by charities they support
- If residual and <1 charity supported, a closer relationship with a charity or positive perception of its impact influences the percentage
- Solicitors tend to validate the residual approach with bequestors
- 1% campaign v 5%–10% recommendation from solicitors



# Residual or Specific GIW



# The Australian, 26 August 2025

- ● Reported increase in probate filings/will disputes between 2020 and 2024 in QLD and NSW.

"People wanting to avoid a legal battle over their estate should seek specialist estate planning and legal advice, and also speak with their family."

"People are living longer and often forming new relationships later in life, which can add to the complexity of estate planning, as can the sizes of estates."

"Another practical step is to consider distributing assets during your lifetime where possible, which significantly reduces the opportunity for disputes after death."



# Bringing bequests forward: motivations & barriers



## Motivations

- The desire to see the impact of their gift while alive
- A strong emotional or spiritual calling to address an urgent need
- Simplifying estate administration for heirs
- Following the example of family members who made living gifts

## Barriers

- Uncertainty about future financial needs (healthcare, aged care)
- The psychological comfort of having a 'safety net' in the form of their estate
- The administrative effort required to restructure their giving



Would you consider bringing forward your bequest?



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# Family Involvement



# Family involvement

- Little discussion amongst families about philanthropy.
- Parental influence on philanthropy tends to be through demonstrated volunteer support.
- Most interviewees had not advised family members of their GIW intentions.
- Charities can play a more active role in encouraging those discussions.
- Potentially impacting continuity of support.



# Family involvement

- Importance of leaving an inheritance influenced by children in more than one respect (#s/relationship/financial wellbeing).
- Post-death acknowledgement/recognition of GIW tends to have low importance.
- Enabling a charity to make an impact in its mission tends to be more important than leaving a legacy.
- The most common way participants wanted to be remembered/thought of by the charities they support is 'kind' and 'caring'.





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## Some Final Advice



What advice would you give to charities to increase gifts in wills?






## Nick Jaffer

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Unlocking the power  
and potential.



Thank you