

# IAC Strategy Plan 2026

In 2026 we will deliver tangibles...



01

- **Solicitor & Advisor Influence - Legacy Legends**



03

- **Member Support & Research**



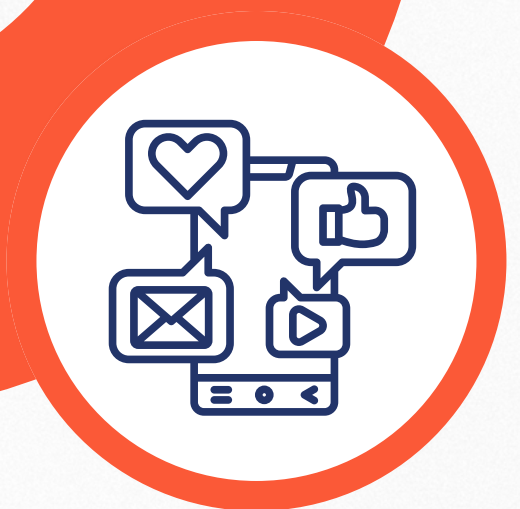
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- **Government Advocacy - Probate Reform**



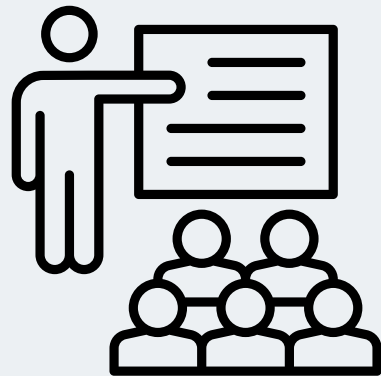
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- **Marketing & Communications**



# Solicitor and Advisor Influence - Legacy Legends

01



## Training modules

- STEP Australia meeting and rollout. CPD points.
- Re-engage with Law Institutes state by state
- \*Society of Trust & Estate Practitioners

02



## Events

- IAC Exhibition stand
- STEP Conference (end of May)
- 2x Wills and Wishes Awareness Day: public, donors, solicitors, estate planners, charities.

03



## Communications

- Newsletters: three p.a to Solicitor database
- Direct marketing, PR & social media campaigns
- Source impact stories and assets for LL use.
- Edit and improve IAC website for LLs

04



## Collaborations

- Invitations to Include a Charity Week events/breakfasts
- Increase partnerships TF solicitors & LLs
- Solicitor survey - resend to Law Institutes etc.

# Government Advocacy - Probate Reform

01



## Research extension

- *Bequests Promised v Bequests Realised* with Bequest Assist and its rollout to the judiciary and legal fraternity, Attorney Generals etc.
- National Will Register

02



## Events

- Canberra/Parliament House event for politicians, judiciary, NFPs, with speakers. June 30.
- Wills & Wishes Awareness Days
- IAC Conference session

03



## Communications

- Direct marketing, PR & social media campaigns through legal journals etc.
- Source positive case stories for use.
- Edit and improve IAC website for reforms.

04

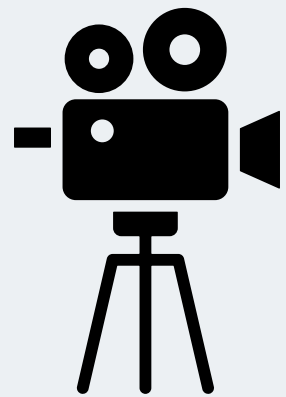


## Collaborations

- Engaging CEOs, policy and legal counsel from charities in activities.
- Working with PA and Taskforce to lobby: eg. superannuation, probate reform.
- Legavision skillshares

# Marketing & Communications

01



## Asset use

- Edit video footage shot in 2025 to develop family discussions promotional material, solicitor engagement and Legacy Legends training.

02



## Events

- Canberra, Parliament House with Good PR
- Wills & Wishes Awareness Days
- Stand and exhibition STEP event
- **20 years** of Include a Charity anniversary

03



## Communications

- Share comms output in IAC Loop Newsletters
- Direct marketing, PR & social media campaigns
- Solicitor and NFP impact stories for LL PR and general use.
- Use PR on website.

04

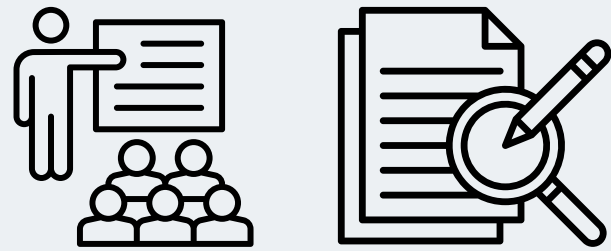


## Collaborations

- Include a Charity Week and Year-Round - Use member video content to normalise gifts in Wills and show breadth of causes.
- DTV

# Member Support & Research

01



## Training & Research

- 4 x p.a - see calendar
- Future of GiW Stewardship Research Legacy Futures Feb 19th
- Benchmarking - More Strategic
- Bequest Assist: Probate Reform

02



## Events

- IAC Exchanges x 2
- Include a Charity Week Roadshow & inclusion of solicitors and boost public content.
- Include a Charity Conference - May 27
- Parliament House, June 30

03



## Communications

- Newsletters: IAC Loop x 2 per month.
- Drive traffic to web pages.
- Direct marketing, PR & social media campaigns
- Source impact stories and videos for use.
- Update IAC website

04



## Collaborations

- Vulnerability in Gifts in Wills Fundraising – training course FIA Education team
- Online Wills Guidance paper - FIA and Taskforce
- CEO/leadership slide deck

# 2026 Calendar



INCLUDE  
A CHARITY

## January

- 19th: IAC Benchmarking Launch
- 28th: Kick-Off Webinar: Deep Dive: *Member Survey & Strategy 2025*



## February

- 25th - 27th: FIA Conference
- 19th: Special event: **Research launch** - The Future of Gifts in Wills Stewardship Research Launch and The Future of Communications

## March

- 17th: Training Day: *Collaboration is the new black: Crafting the gift with the donor and finding your tribe.*
- 25th: IAC/Bequest Assist: Where There's a Will Series



## April

30th:  
**Wills and Wishes Awareness Day**  
VIC

## May

27th:  
**IAC One-Day Conference**

13th: IAC Week overview

## June

30th:

**Legacy Event Canberra**

16th: IAC/Bequest Assist: Where There's a Will Series

30th: **Membership renewal deadline**

## July

- 8th: Training Day: *First Gift to Gifts in Wills and the Power of the Thank You.*



## August

- 11th: IAC Exchange
- 31st: **IAC Week begins**  
(NSW, VIC, QLD, WA)

## September

Aug 31st - 6th: **Include a Charity Week!**  
(NSW, VIC, QLD, WA)

- 30th: IAC/Bequest Assist: Where There's a Will Series

## October

27th:

**Wills and Wishes Awareness Day NSW**

- 28th: Training Day: *Stewardship in Action: Tailoring to Your Audience*

## November

- 4th: IAC Week Show & Tell
- 18th: IAC/Bequest Assist: Where There's a Will Series

## December

- 2nd: Training Morning: *Small org big ambitions: Spreading the love for Gifts in Wills*
- **Christmas Networking**



# Questions?

## Upcoming events:



*The Future of Gifts in Wills Stewardship  
Research Launch  
& The Future of Communication*

*presented by*

**We.**  INCLUDE A CHARITY 

When:  
19<sup>th</sup> of February,  
1:30pm - 4:00pm  
AEDT

Where:  
Australian Red Cross,  
Docklands, VIC.



FIA CONFERENCE 2026  
**IMPACT  
AMPLIFIED**  
25-27 February, Melbourne