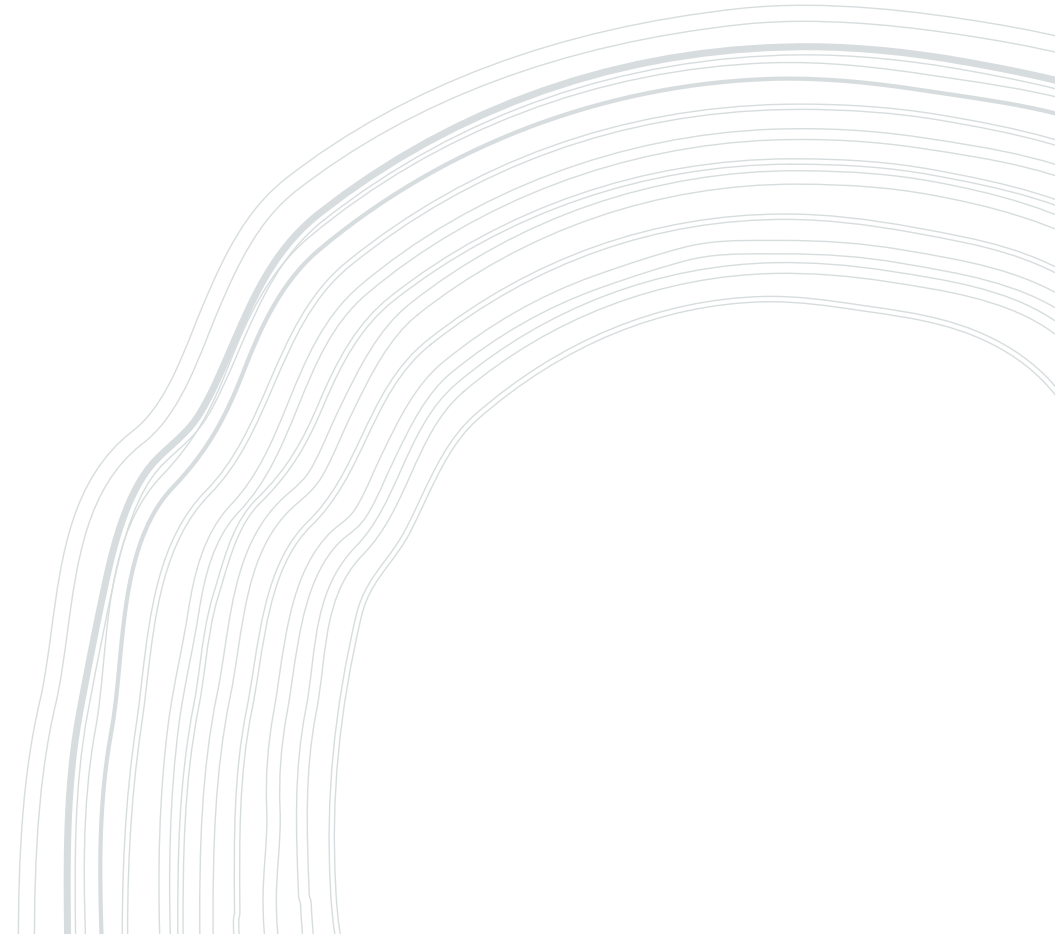


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Collaborate. Understand. Inspire.

Include A Charity

17 MARCH 2026



| Nice to meet you!



Lena Vizy  
Senior Consultant

**Legacy  
Futures**  
Together with Smee & Ford

**LEGAVISION**



# Collaboration

How does it look like?



BETWEEN  
COLLEAGUES



BETWEEN  
DEPARTMENTS



BETWEEN  
ORGANISATIONS



BETWEEN  
STAKEHOLDERS



BETWEEN  
COUNTRIES



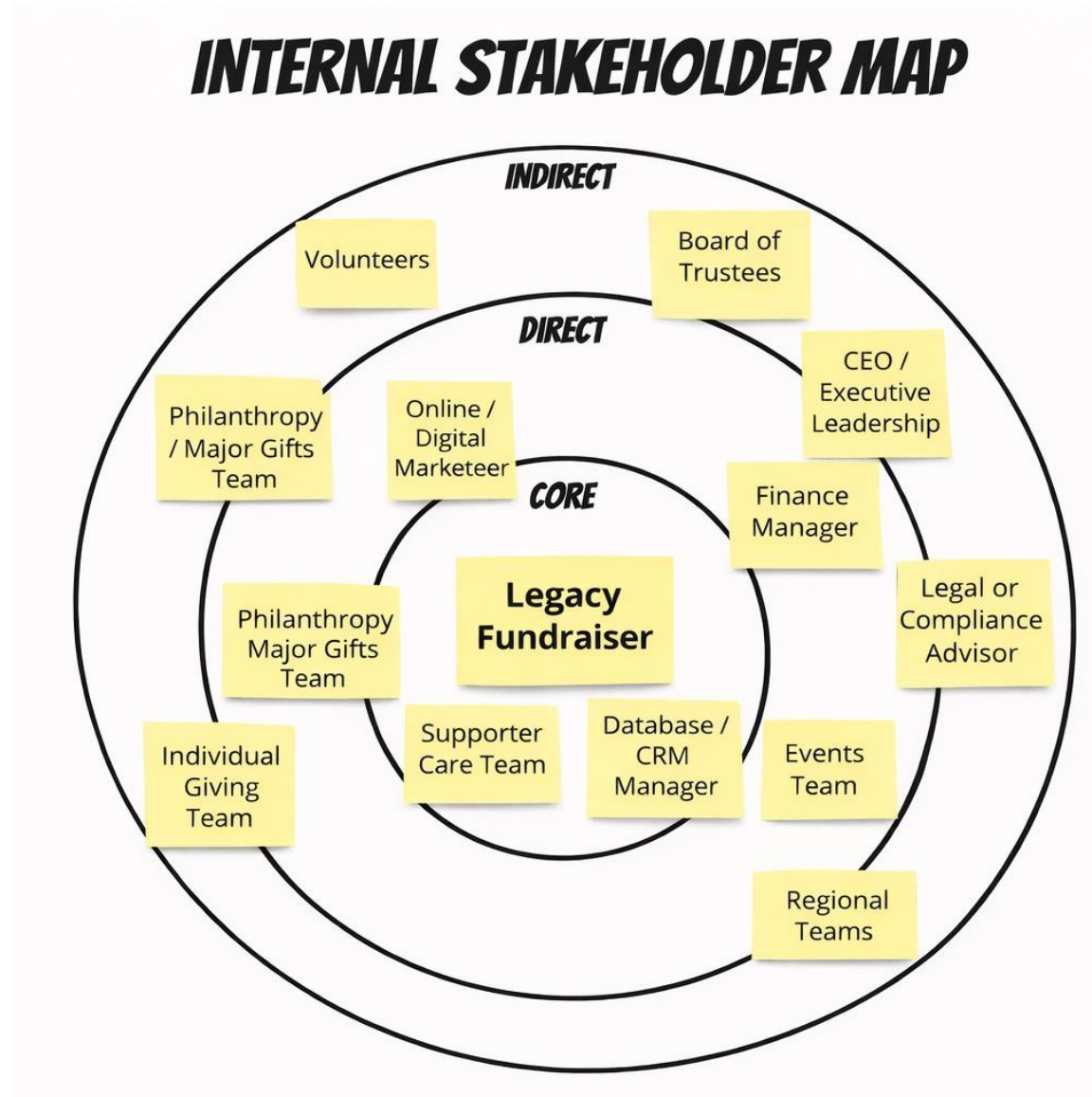
BETWEEN COLLEAGUES



BETWEEN  
DEPARTMENTS

# Collaboration

What does it look like?



# Collaboration

What does it look like?



BETWEEN COLLEAGUES



BETWEEN  
DEPARTMENTS

# | Collaboration



BETWEEN  
COLLEAGUES



BETWEEN  
DEPARTMENTS



BETWEEN  
ORGANISATIONS



BETWEEN  
STAKEHOLDERS



BETWEEN  
COUNTRIES

# Collaboration

What does it look like?



BETWEEN  
ORGANISATIONS



BETWEEN  
STAKEHOLDERS



BETWEEN COUNTRIES

**Australia** - Include a charity

**Austria** - Vergiss mein nicht

**Argentina** - Legados Solidarios

**Belgium** - Testament.be

**Canada** - Will Power

**Czech Republic** - Za Snadné Darcovství

**Germany** - Mein Erbe tut Gutes | Nachlass Portal

**Denmark** - Det Gode Testamente

**France** - Testament Solidaire

**Finland** - Hyva Testamentti

**Ireland** - My Legacy

**Italy** - Testamento Solidale

**Hong Kong** - Forevergift

**Japan** - Izoukifu

**Netherlands** - Toegift.nl

**New Zealand** - Include a Charity

**North Ireland** - Will to Give

**Norway** - Det Gode Testament

**Poland** - Dobry Testament | Napisz Testament

**South Korea** - Legacy Korea

**Spain** - Haz Testamento Solidario

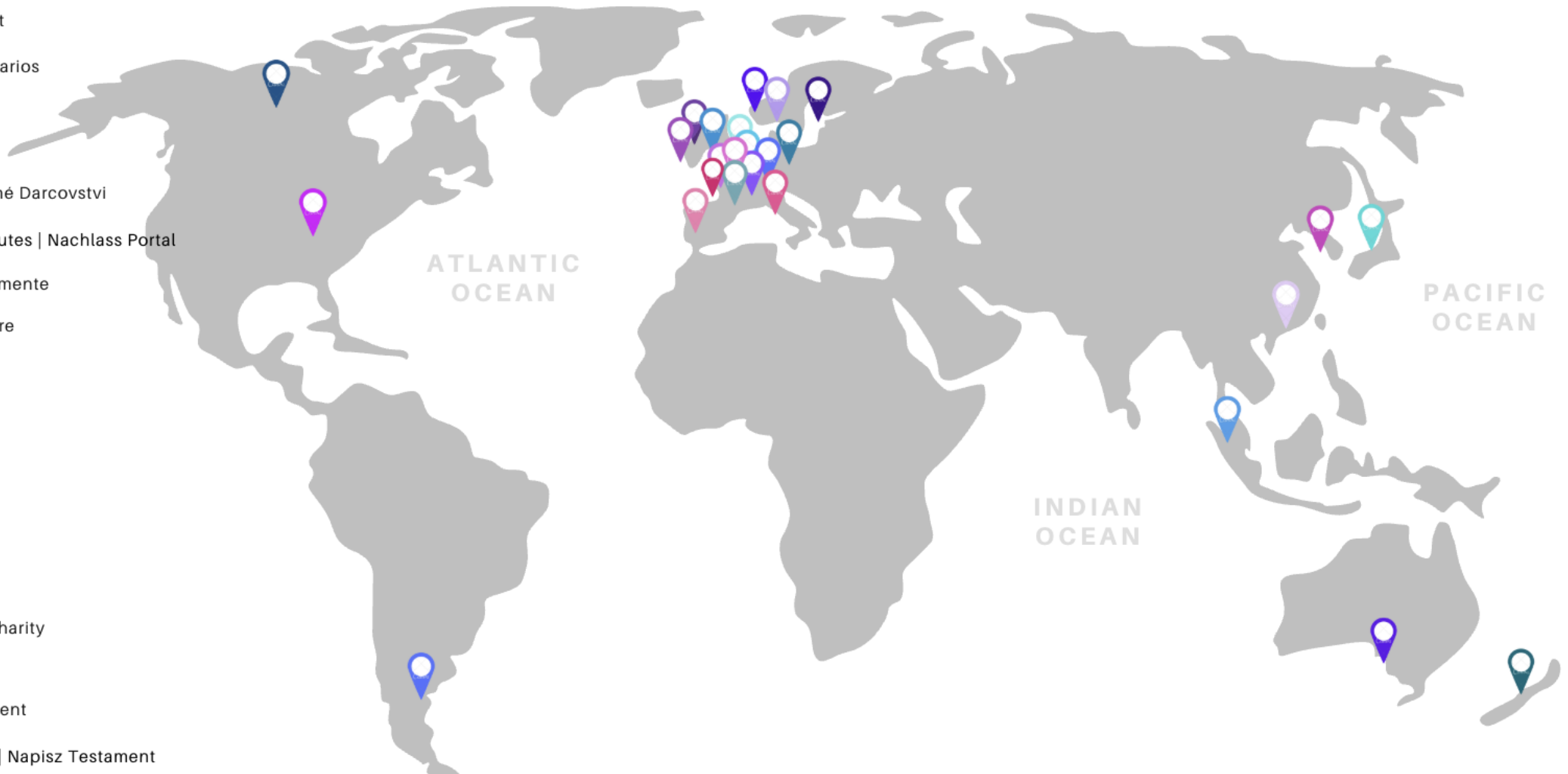
**United Kingdom** - Remember A Charity

**United States of America** - Leave a Legacy

**Singapore** - A Greater Gift

**Sweden** - Testamentesveckan.se

**Switzerland** - Testament für das Gemeinwohl



## 26 Joint Legacy Campaigns

**LEGAVISION**  
A World of Legacies

# 3 examples of collaboration outside your organisation

# 1. Argentina - Legados Solidarios



# I Why Collaboration Created a Breakthrough

- United voice
- Felt less risky
- Shared platform
- Cost-effective
- Shift in culture



On the left - Victoria Bayón – UNICEF Argentina on the news channel LN+ (La Nación+)

# | 1. Legados Solidarios



*When organizations united around legacy messaging, they can open up an entire new market for legacy giving.*



## | 2. Your Catholic Legacy



**Twelve consistent YCL 'core' members**

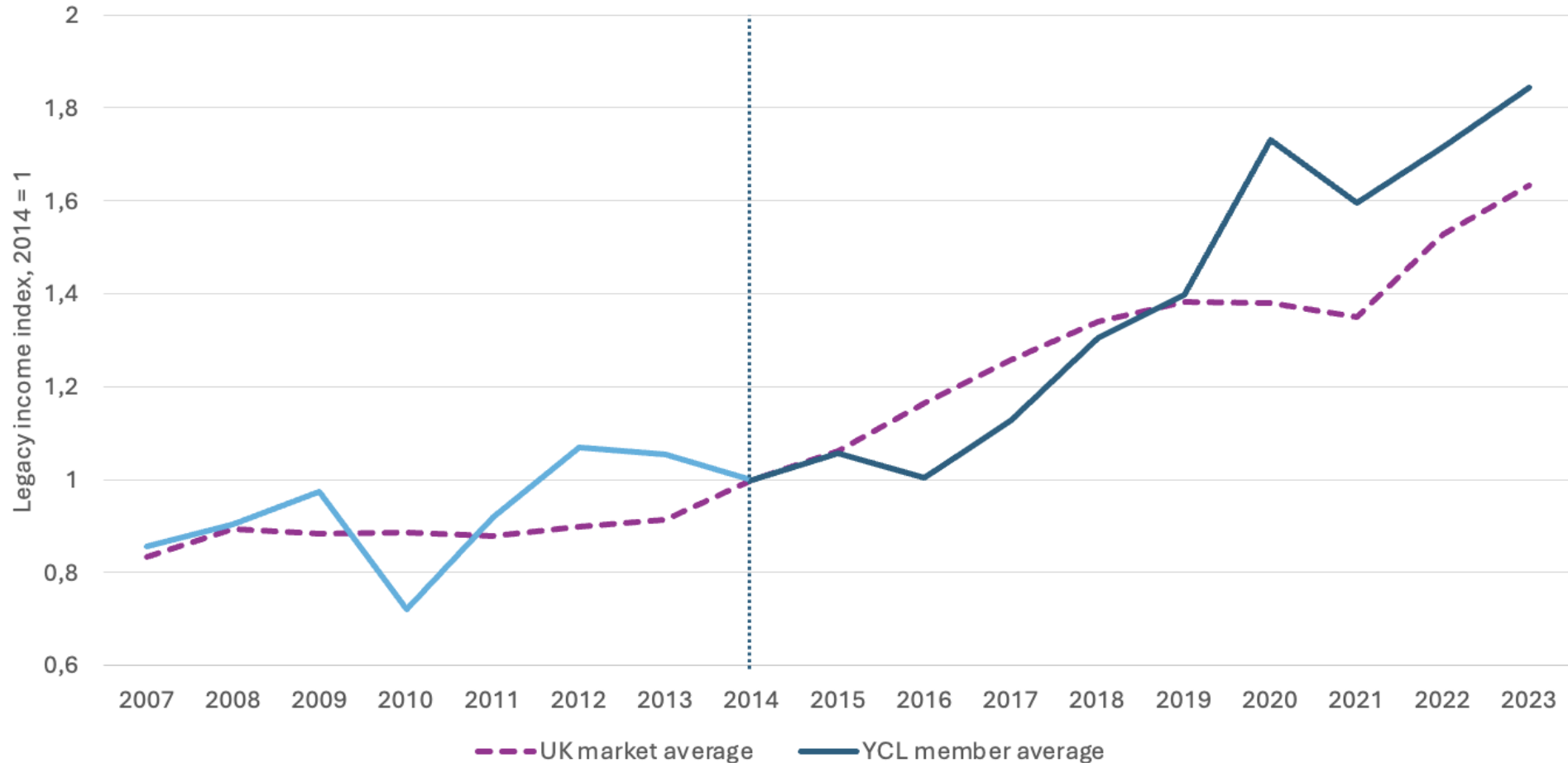
# | Why Collaboration Created a Breakthrough?

- Stronger together
- Shared recognition
- Learning from each other





# Stronger Than the Market – 7.5% Annual Legacy Growth for Core Members



YCL avg. growth  
**7.5%\*** p.a.  
since 2014

UK avg. growth  
**4.4%** p.a.  
since 2014

## I 2. Your Catholic Legacy

*By collaboration Catholic charities grew stronger together  
— achieving 7.5% annual legacy growth.*



### 3. Haarlem's Culture institutions



FRANS HALS  
MUSEUM

Stadsschouwburg  
Haarlem

SCHUUR

TEYLERS  
T

phil.

# | Why Collaboration Created a Breakthrough?

- Shared event
- Joint marketing and promotion
- Expert access (solicitor)
- Cross-institution storytelling



# | 3. Haarlem's Culture Institutions

*Collaboration doesn't need to be national — in Haarlem, a simple shared event between local institutions built awareness*

**GEEF  
TOEKOMST  
AAN  
CULTUUR  
IN HAARLEM**

# | Event together



# | What charities can take from this

## Internally

- Build internal alignment around legacies
- Map your internal stakeholders – legacy fundraising requires internal marketing so colleagues see what’s in it for them
- Build confidence through results – when teams see impact, legacies move from a niche activity to a strategic priority

## Externally

- Collaboration helps legacy giving grow
- Don’t go it alone – even 2–3 partners can make the message stronger and safer
- Grow the conversation together – collaboration helps open new audiences and normalise legacy giving
- Think audience-first – frame legacies through supporters’ values and the impact they want to leave behind



## I Breakout (10 min)

What kind of collaborations have you set up regarding legacy gifts? Also with other partners – not necessary charities?

What does the collaboration looks like? What worked best in identifying and developing it?

What other collaborations could help you regarding legacies?  
What could you do to build them?

| What parts of the presentation resonated with you?



# | The Legacy Futures family

Legacy Futures, together with Smee & Ford is the UK's leading charity consultancy group that specialises in gifts in wills and in-memory giving. We provide the legacy giving data and analysis services that drive the UK market. And we are trusted partner to over 1,000 charities in the UK and worldwide, supporting them to harness the transformative power of legacy giving.

## **Legacy Futures**

Legacy Futures is best known for research, analysis, and strategy. We work with charities large and small, UK and International, turning insight into strategy and action.

## **Legacy Link**

Legacy Link is the UK's largest team of estate administration consultants, helping to maximise the gifts left to a charity, and adding value at every step of the way.

## **Smee&Ford**

Smee & Ford provides timely and accurate legacy notification services for administration teams to optimise their services.



# Legacy Futures

Together with Smee & Ford

## Thank you

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Connect with us

