

TOP TIPS FOR STARTING LEGACY CONVERSATIONS

Before you go straight into the conversation starters, it's important to reframe your thinking around how to approach talking about legacies.

Legacy giving is simply another way to support your charity. Without gifts in wills many charities simply wouldn't be able to exist. The impact of these gifts is huge and so it's important that all supporters have the opportunity to consider this way of giving.

Below are some top tips to help get those conversations started

1. ADDING GIFTS IN WILLS WITHIN A LIST OF OPTIONS

If you're already talking to a supporter about donating, or if they've asked you about supporting you in some form, why not say something like:

“While we're on the subject of supporting our work, have you ever thought about volunteering, campaigning, or leaving a gift in your will? “

By adding 'gifts in wills' within a list of other things you soften the ask and it gives the supporter a choice. If they don't indicate interest in legacies that's absolutely fine, at least now they're aware it's an option.

2. START WITH MOTIVATION

If you're meeting a supporter for the first time or chatting to them over the phone or at an event, then an easy opener is ***“What motivated you to get involved with/support <charity name>?”***

From there you'll gauge their personal connection with your cause, which may lead to a particular area of your work. If it feels natural, you can then say something like:

“Did you know that XX% of our funds come from gifts in wills? So a lot of our work in that area simply wouldn't exist without them. I know you've generously supported us a lot over the years, have you ever considered that way of giving at all?”

Gauge their reaction and if they haven't thought about it before, offer to send them some more information. If at any time they indicate they're not interested, don't force the subject, simply say that's fine and change the subject.

3. LEGACY EVENTS

If you host legacy events, they can be a great way of introducing the topic of legacies by inviting them along. For example, if you're talking to someone about a project and you know it will be raised at an upcoming legacy event, you could say something like:

“My colleague XXX is actually going to be talking about this area of our work at an upcoming event. The event will also be focused on gifts in wills and the difference they make. If you're interested, I'd be happy to send you the details?”

4. FREE WILL OFFERINGS

If you offer a free wills service and are already talking about gifts in wills, or if someone indicates they're considering giving a gift in their will, why not mention your free wills service as a next step:

“That's great to hear you're thinking about leave a gift in your will. Did you know we offer a free wills service? So, when you're ready to write or update your will you can do so for free with one of our partners - I can send you some further information if you're interested?”

NB: If your organisation is thinking of offering free and discounted Will schemes, you should follow the Charity Commission guidelines as set out in the Charity Commission guidance ‘[Paying for Wills with Charity Funds](#)’.

It is essential that fundraisers do not make it a condition that the charity is included in the Will. Fundraisers who fail to follow these guidelines run the serious risk that the Will may be contested, and such actions may jeopardise all of the organisation’s legacies.

Good Luck!

Information courtesy of www.legupforlegacies.guardianangel.network/

Leg up for Legacies is a FREE legacy marketing community.

A space to share ideas, challenges, and successes with like-minded people in the industry. A quick way of accessing hot tips and easy-to-use how-to guides to help you get your legacy campaign skyrocketing.