

# Legacy Giving



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## Key Concepts & Strategies

- Income from legacies is usually unrestricted
- Legacies can be comparatively inexpensive to raise
- Legacy gifts may be pecuniary (gifts of a specific sum)
- Legacy gifts may be residuary gifts (gifts of the balance of the estate after specific legacies and debts have been paid)
- Legacy gifts can be non-monetary e.g. property/jewellery (specific legacy)

## Why leave a legacy/bequest?

### Reasons why donors make bequests:

- Desire to support the cause
- The ultimate use of the gift by the organisation
- Long range estate and financial planning issues
- Create a lasting memorial for self or loved one
- Relationship with a representative of the organisation
- Encouragement of family and friends
- Encouragement of legal or financial advisers
- Desire to reduce taxes

### Who is more likely to leave a legacy?

- Individuals with no children or close relatives
- Individuals with children who are doing extremely well in their chosen careers, and prospect doesn't have to worry about providing for them
- Widow/widower having outlived a spouse
- Single females over 65
- Some of the donor's/donors' assets have greatly appreciated, and donor/donors don't want to pay the capital gains
- Individual has some assets that may bring some heavy taxation
- Individual heard that some charities are able to accept gift of property and other items

## Making a will



**The key main reasons why an individual will make a will are:**

- Illness of the individual
- Death of a relative
- Difficulties associated with having to sort out the estate of a family member
- Some form of family change e.g. marriage, divorce, having a child
- Planning extended long distance travel
- Purchase of a house

It is at the time of making a will that a legacy will be considered

### **Ireland's Legacy landscape**

A total of 1,612 bequests were made to the charities surveyed over the three years (2012-2014) worth a total value of €44,952,559; the smallest individual bequest was €20 (Focus Ireland) and the largest individual bequest was €7,000,000 (Barretstown).

Property was the main form of non-monetary bequest received.

In 2018 [Elizabeth O'Kelly left €30 million](#) between 5 organisations – by far the largest ever charitable legacy left in Ireland. The media coverage of this gift promoted legacy giving as a way to support charitable causes.

## My Legacy – [www.mylegacy.ie](http://www.mylegacy.ie)

- My Legacy was established in 2006 by a small group of Irish not-for-profits who knew at first hand the great impact a legacy gift can have on the work of an organisation.
- They also realised that, unlike other countries, many Irish people do not make a will despite how important a life document it is.



- Since then, My Legacy has grown to an umbrella group of 60 Irish organisations who work together to ask people to consider leaving a legacy gift to a favourite cause, once family and friends have been taken care of and all other important personal decisions have been made.

## My Legacy Week

- My Legacy Week is an autumn campaign that raises awareness around why having a will is very important for so many good reasons.
- My Legacy encourage you to take that first step in writing your will by making an appointment with a solicitor.
- More information on this campaign here – [www.mylegacy.ie](http://www.mylegacy.ie)

# Legacy Fundraising Strategies

## Investing in Ireland

“Donating to CFI after my death will allow me to provide long-term support for tackling pressing social issues throughout Ireland - issues such as mental health, youth unemployment and building a sense of community within neighbourhoods. With its total commitment to accountability, transparency and strong governance, I know that I can rely on CFI to never waver from its policies of prudent investing and effective spending.”

Sean Mac Grainne, Legacy Pledger at The Community Foundation for Ireland

### Find your target audience:

- Committed donors on your organisation’s database
- Audience and members of the public with an association to your artform
- Beneficiaries
- Board members

### Medium through which messaging can be delivered:

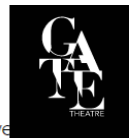
- Direct mail:
  - Committed donors on your database are sent a personally addressed mail pack that introduces the idea of legacy giving, explains the importance of legacies, explains the importance of will making, and gives information on how to leave a legacy to the charity
  - Donors who received a letter directly asking them for a legacy were 17 times more likely to give a legacy than donors who were not asked



- Donors who do respond to legacy direct mail campaigns should be flagged on the donor database as a legacy pledger and receive special communications
- Newspaper advertisements
- Presentations to groups of supporters:
  - Enables organisations to engage donors on a very personal level
  - Able to facilitate dialogue which barriers and concerns of legacy giving can be addressed
  - Should be conducted by trained individuals
- Legacy brochure/reading material
- Testimonials in newsletter:
  - Supporter magazines/newsletters should feature regular legacy stories
  - Supporter magazines could include an article written by a family member explaining how proud they are that their mother/father has used their money so wisely to transform a specific organisation or arts programme.
- Online – leave a legacy section
- Personal visit

## Leaving a Lasting Legacy

When your private affairs are in place, you may consider leaving a Legacy to the Gate Theatre as your own uniquely valuable way to investing in the creative and emotional impact of The Gate's programmes for audiences today and for future generations of theatre lovers.



If you would like to have a private conversation about Legacy Giving, please contact [paula.mcdermott@gate-theatre.ie](mailto:paula.mcdermott@gate-theatre.ie).

*"Tomorrow we will run faster, stretch out our arms farther..."*  
F. Scott Fitzgerald's *The Great Gatsby*

The Gate is a not-for-profit-theatre with charitable status Charity Number CHY 11638.  
Registered in Ireland. Company Number 27768.

## Free Advice for your donors

- There are a number of organisations that provide a will writing service for free.
- There are also several schemes that let your donor have a will drawn up by a solicitor free of charge.
- Friendly solicitors might be able to offer legal advice to a not for profit perhaps if there are any complicated legalities surrounding a gift.

## Developing Legacy Communications

### Approaching Supporters

Ideally, you should approach supporters when they are considering writing their wills. People write their wills at key life stages, including the birth of a child, purchase of property, marriage, divorce, and retirement or when they are faced with a serious or terminal illness. There is a challenge in that we cannot tell when these events will happen, so an ongoing relationship needs to be built before approaching the topic of legacies with any potential donor.

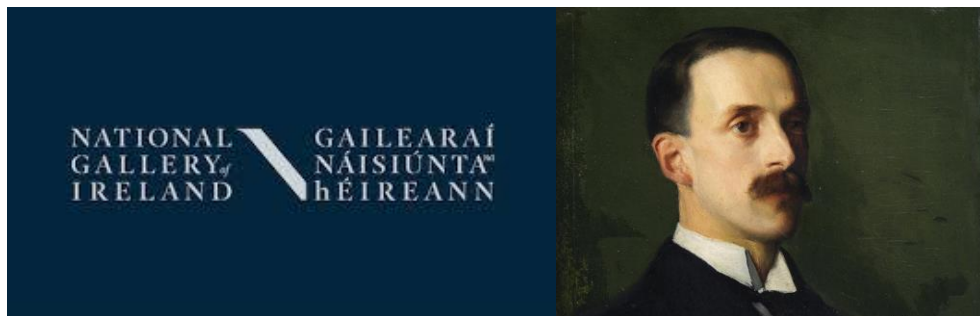


*“It’s difficult to track when people are going to change or make their wills. You can’t just phone them up and ask them about it, so you have to engage with them the whole time”, Richard Radcliffe, former executive chairman of charitable legacy agency Smee & Ford.*



We recommend subtle contact on a regular basis, indirect messages incorporated into marketing materials, mailings and legacy stories shared in publications (newsletters, direct marketing etc.) from your organisation.

Frequent indirect communication will increase the chance of coinciding with the supporter changing or making their will without making them feel uncomfortable. A story or quote from an existing legator is ideal as research has shown that people are more likely to give when they are made aware that legacy giving is something that others do.



## LEAVING A LEGACY

Remembering the Gallery in your will is a wonderful way to make a lasting contribution for the benefit of future generations. By leaving a bequest, large or small, you can help us protect and share the wonders of the national collection of fine art, and strengthen our exhibitions programme and our range of activities in Education, Conservation, and Library and Archives, among others. **Contact us for more details at [development@ngi.ie](mailto:development@ngi.ie) or by phoning the Development Department at +353 (0)1-6633500.**

## Examples of Legacy Brochures:

<https://www.makeawish.ie/images/uploads/documents/Legacy-Brochure-1.pdf>

<https://www.stcolumbas.ie/wp-content/uploads/2018/11/Legacy-Leaflet.pdf>

[https://issuu.com/dallasmuseumofart/docs/plannedgiving\\_brochure](https://issuu.com/dallasmuseumofart/docs/plannedgiving_brochure)

## How to ask

Respectful and direct language is important when communicating about legacies. Making yourself familiar with your method of discussion with any potential legacy donor is crucial given how sensitive this issue/topic can be and how easy it is to offend without meaning. Jargon and flowery words don't help; the approach must be a grounded and subtle - but honest.

In discussing legacies to be persuasive you must be believable, so avoid negative stories or guilt driven messages. A phrase such as the following may be a good starting point:

*“If or when the time is right for you to include a gift in your will, we would appreciate if you would consider remembering X. Every legacy gift, regardless of size, is hugely valued by us”*

## Presenting Information

The older generation or those nearing end of life, are often considered the audience worth focusing on as they are often more prepared to listen and think of what can be left behind by them at this stage in their lives and what difference they can make to the lives of future generations.

It must be acknowledged that older people may have poor vision so when presenting information large typeface, pictures, short stories and colour schemes can make it easier for viewing.

## Strategy

Hold a focus group to get feedback / ideas for your Legacy strategy. You could ask some of the following:

- What motivates you to support our organisation? (and indeed to take the time to come here today!)
- Are there particular areas/programmes within the organisation that are of specific interest to you?
- What are your thoughts/views in relation to the organisation's various fundraising appeals?
- What are your thoughts on legacies?
- Have you made a will?
- Have you included a charitable legacy in your will?
- If not, is it something that you would consider?
- What would be important to you in making a decision to leave a legacy?
- Are you comfortable discussing legacies? (If not, why not?)
- What do you think of our organisation's current development material, legacy materials etc.? (share brochures with them)
- What information/stories would be important to you in making a decision to include a legacy in your will?
- Any other insights/comments?



## **Making legacy giving accessible to all**

*“People think legacies must be enormous, so make it clear that any size of a gift is valued and welcomed” - Richard Radcliffe, international legacy expert.*

Finally, advising your donor on legal procedures is important and necessary in normalising what they are considering. It creates an environment of trust and belief that this is something many do and it is a positive, straightforward way to support.

**Overall, an ask for a gift in a will has to be based on outcomes of major visionary change or improvement. Outcomes that display the organisation’s core values and long-term mission and impact will be the most logical approach.**

