



TALKING ABOUT... GIFTS IN WILLS

A handy toolkit for RDA groups, fundraisers and volunteers. Presented by:





GIFT IN WILLS: GIVING THAT LASTS BEYOND A LIFETIME...

In the last 15 years, gifts given in Wills to charities has grown from £1.7 billion to £4 billion and it's due to double again by 2044. Every year, around 2,000 small charities are named in a Will for the very first time...

However, without letting those who care about our work know that it is possible to leave a gift to your local RDA group, or how much a gift could achieve, you may miss out on these transformative gifts, which will bring joy, change lives and provide financial assurance for your group.

This toolkit is a simple "how to" guide for groups and fundraisers across RDA to share the opportunity of giving a gift in a Will.

You will NEVER need to ask anyone directly for a legacy.

The actions outlined in this toolkit cost very little and focus on how to integrate messages into your communications in upbeat ways.

The lead-author of this toolkit, Richard Radcliffe FClO F Cert, has over 30 years' experience in guiding charities on growing legacy giving. His evidence is gained from meeting 35,000 donors, service users and volunteers for over 500 charities.

WHAT IS A GIFT IN A WILL?

Gifts in Wills - sometimes called legacies or bequests - are not just for the wealthy. Most are given due to a personal experience or connection and can be given by anyone who has assets to leave.

It is the ideal gift to give for anyone who may not have immediate access to their assets. A gift left in a Will costs nothing now, but could mean the world to RDA and our participants in the future.

There are several types of gift that can be included in a Will:



A **Residuary** gift is a gift of a specific sum. These gifts can be anything from £1 upwards, but remember: they don't keep up with inflation.



A **Pecuniary** gift is a gift of a specific sum. These gifts can be anything from £1 upwards, but remember: they don't keep up with inflation.



A **Specific** gift is an item, which could be anything from a property through to an item of jewellery or other memento.

A good local solicitor will talk through the options and highlight what is best for each and every client.

If anyone wants to leave a gift in their Will, all they need to know before they speak with their solicitor is:

- **your group's full name;**
- **your group's registered charity number.**

Ensure that information is easy to find!



Please never give legal, financial or investment advice. The Charity Commission and the Fundraising Regulator both have guidelines and we can give you the links if required.

Preparing now for future gifts...

A few simple steps made now could help prepare the way to your group receiving gifts in wills in the future.

1.

Explain where your funds come from

Why? Because very few people engaged with an RDA group, or in the broader community, will know.

This results in many thinking only of giving donation now or taking part in an event as ways they can show their support.

A gift in their Will will not be in their mind as a way to secure and grow your future. But a simple statement on how you are funded will trigger interest.

Look at your annual accounts and work out the split between voluntary and other income. Income from charitable activities, grants and donations can all be classified as voluntary income.

When you look at your accounts, voluntary income can, for some RDA Centres, be as high as 99% but it varies so please check yours!.

An example of a statement to put in as many communications as possible:

“Did you know, XX% of our funds at XXX RDA are from voluntary income, such as donations, fundraising events and even gifts in Wills?”

Simple and informative!

2.

Spread the word

Once you have your message about how your group is funded, include it wherever you can:

- As a PS in a letter,
- On an email signature,
- Include it in an article in your newsletter,
- Have a section on your website
- Use on a slide for a local talk.

The following are only suggestions – tweak them to suit your own tone of voice.

“Did you know, you can leave a gift in your will as small as 1% to our RDA Centre, so those closest to you inherit 99%? You can of course leave more if you want to”.

“Did you know, in your Will, you can leave us from 1% to 100% of your estate? Whatever suits you. This type of gift ensures all those you want to benefit from your Will inherit what YOU choose”.

“Did you know we receive no government funding? We rely entirely (depending on your local RDA Centre) on our community giving their time, donations and gifts in Wills.”

In a local talk you could add:

“Your donations secure our work with children and adults every day, A gift in your Will can help us provide more services and transform more lives and produce more life changing smiles.”

“When the time is right for you to remember a charity in your Will, please remember XXX RDA Group.”

“Every gift in every Will, however large or small, will help transform the lives of children and adults who participate in our life changing activities.”

“Did you know the only information needed by your professional adviser to remember XXX RDA Centre in your Will is our Registered Charity Number [.....] and name [....]”

“How do you feel about a gift in your Will to XXX RDA Centre? Did you realise it could be even 1% of your estate so your family inherit the remainder? Every gift in every will - from 1% to 100%, will make the world of difference to future generations of children and adults at XXX RDA Group.”

3.

Websites and printed materials

Consistently integrating your messages about Gifts in Wills is more cost effective and will have better results than having a stand alone leaflet or brochure. Having a gifts in wills message on **your website** featuring your registered name and charity number is vital, as many individuals and solicitors will often look here to find the details they need. Adapt RDA UK's own webpage with your own information, if you like, or create your own.

If you were to print one additional piece of collateral we would recommend a **bookmark** - both practical and affordable. A draft design can be shared with your group for personalisation and printing, but your group may wish to design your own.

What should you do with your bookmarks?

- Give them to volunteers to put in their local community.
- Leave them in local veterinary surgeries and doctors' surgeries.
- Give them out at group events, local talks, Rotary visits etc.
- Give them to families or insert them into letters, newsletters, etc.

What next?

You may wish to keep a note of enquiries and keep in touch, via your newsletter, event invitations etc, with anyone who shows an interest or tells you they have included your group in their will. And remember: you won't see any results straight away. This set of activities is about planting seeds for the future: you may not see an increase in income for 5 years.



Most importantly, please keep drip feeding those messages. We will update our guidelines again next year with further advice and support.

In the meantime, please contact Philippa on pfairhall@rda.org.uk or call 01926 962982 if you have any further questions.