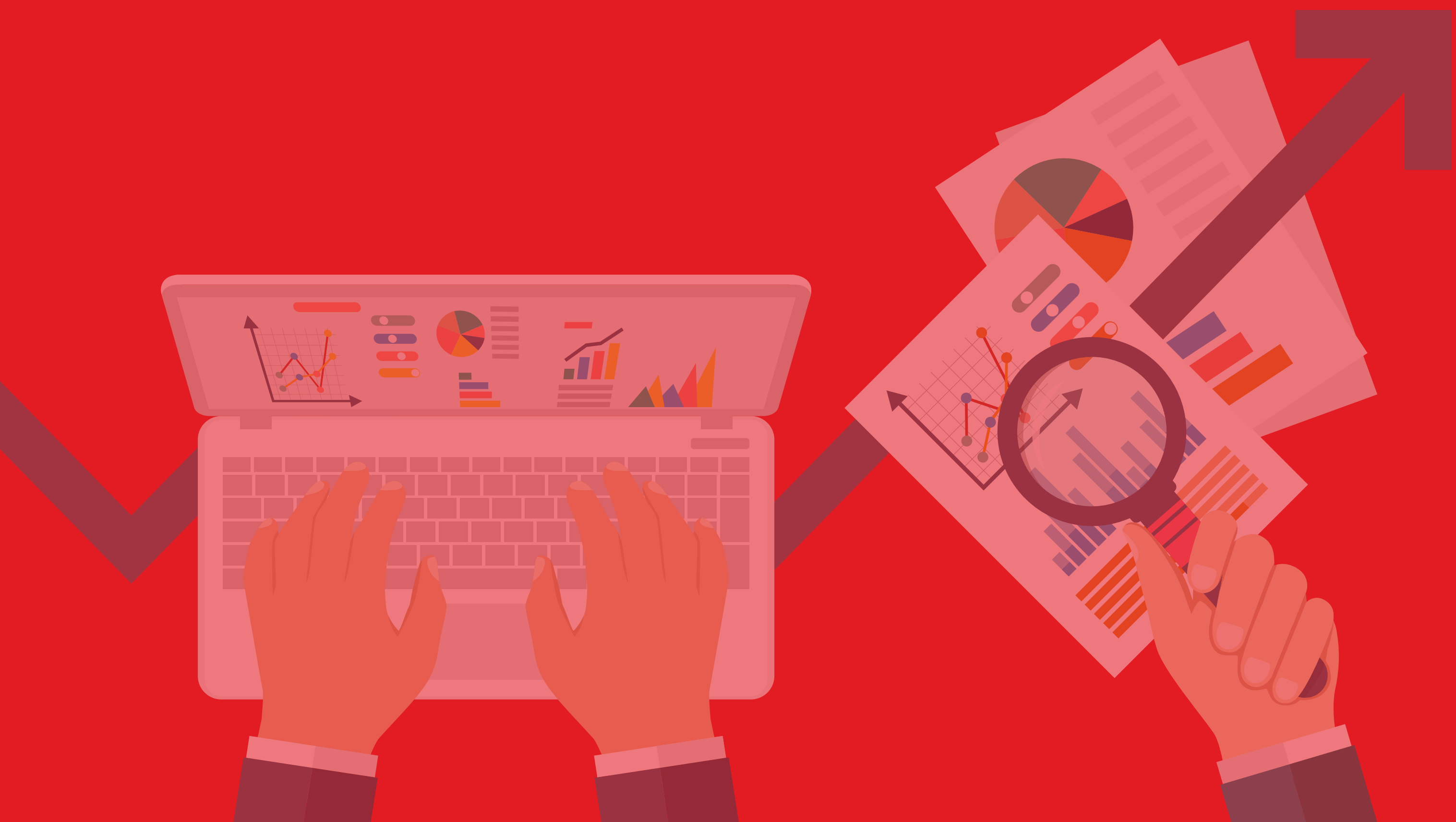
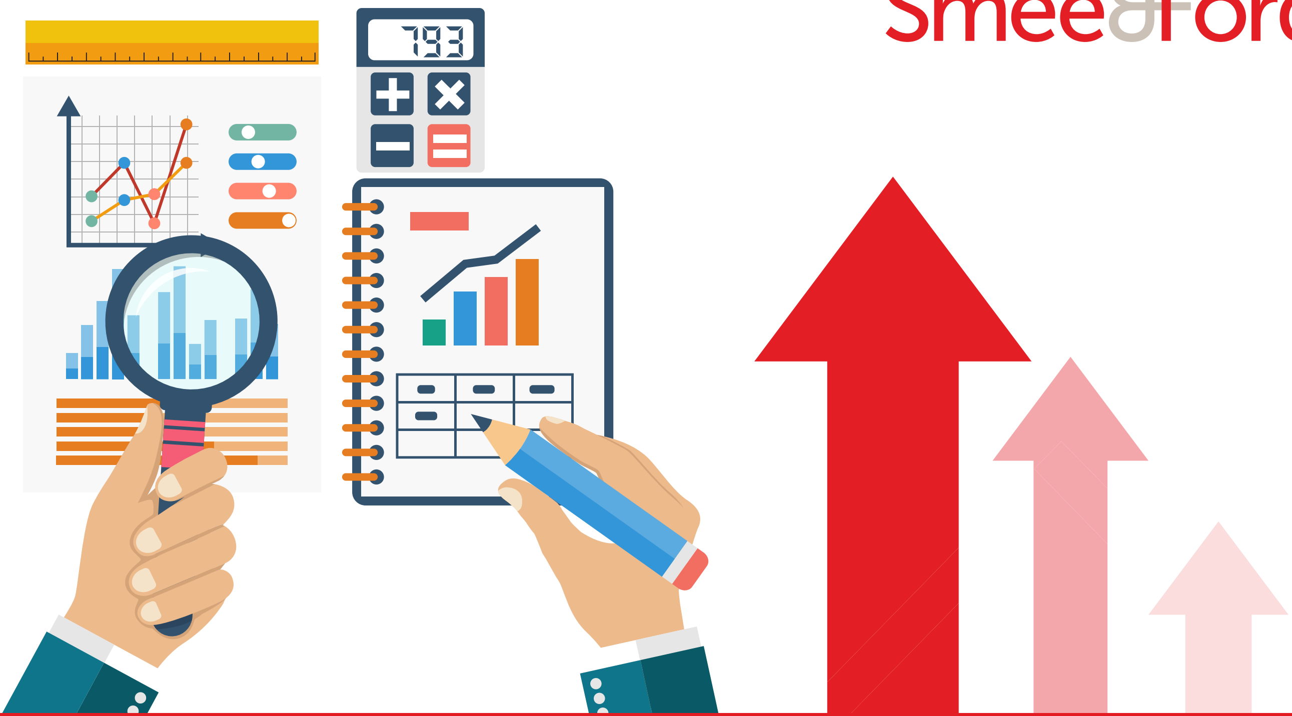
Smee&Ford

Legacy solutions for charities





Introduction

We work with fundraising and insight professionals from a variety of UK charities to help them analyse and understand trends in legacy giving to identify opportunities to grow their legacy income. We understand that every organisation has its own challenges which can arise from:

- Building a case for additional investment to grow legacy programmes
- Working in small teams with increasing responsibility, leaving less time for detailed data analysis
- Updating strategies using incomplete and inconsistent internal data
- Comparing performance against peer charities, with limited or no access to detailed sector data
- Operating in a growing and highly competitive fundraising stream

Our legacy intelligence, coupled with our data solutions, maps the UKs charitable legacies to provide you with the detailed bequest data to inform your future fundraising campaigns.

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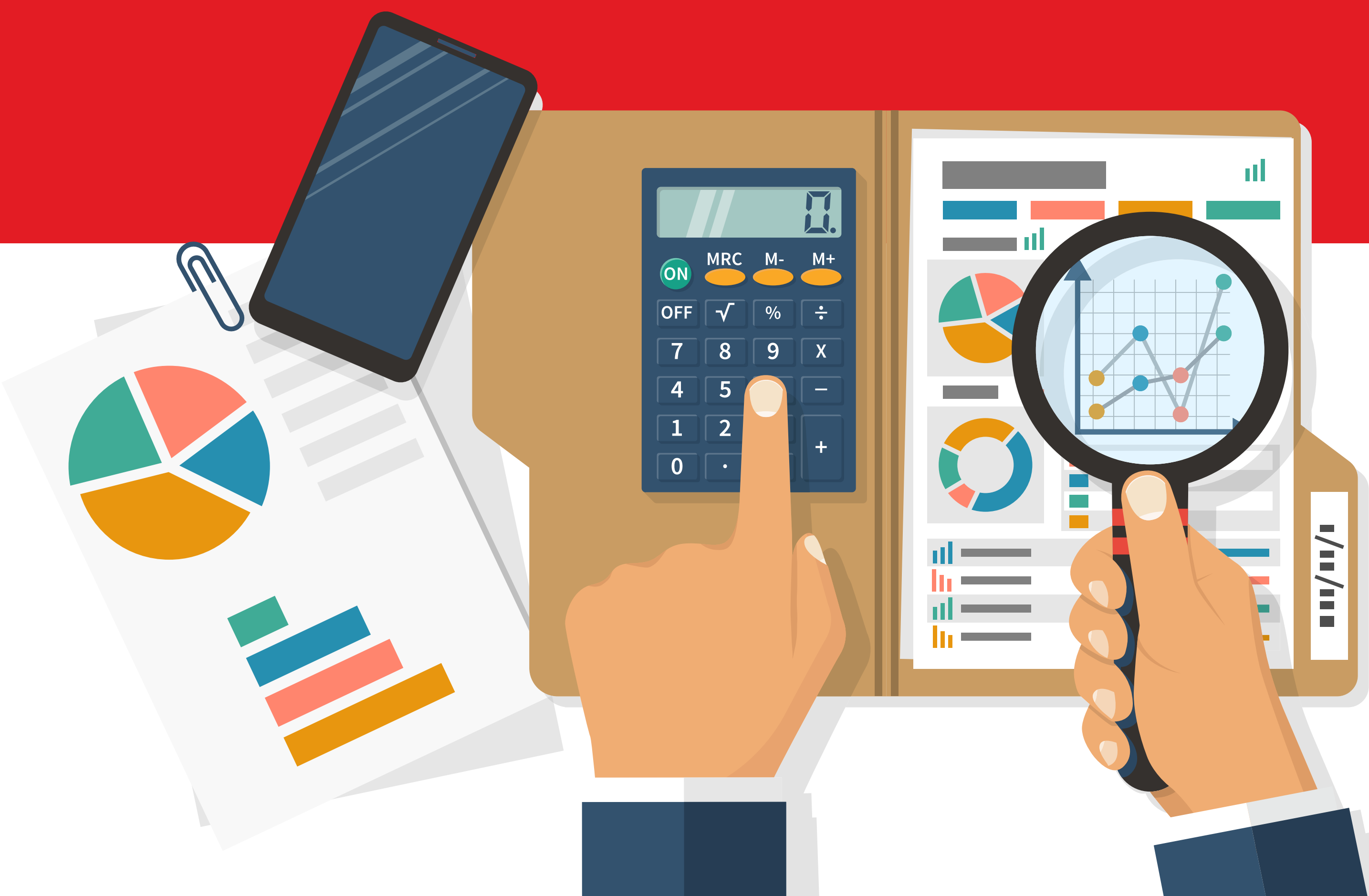
Why are we best placed to help you?

Smee & Ford has more than 125 years' experience in legacies. Our team reads through around 5,000 Wills each week, identifying and reporting any charitable content. This has enabled us to build an extensive database of legacy giving in the UK, with information on every bequest for each named charity mentioned in a Will since September 2012. Since 2012 we have identified more than 37,000 charities that have been named in Wills, with 2,593 named for the first time in 2021.

Our unique insight

Smee & Ford has the most comprehensive information on legacy giving. Our data can be used to determine trends in the legacy market which can help charities forecast their potential future legacy income or help plan their legacy marketing strategy.



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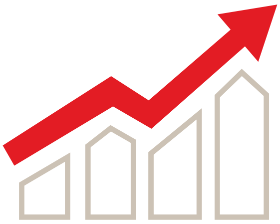
Looking at the complete legacy picture for 2021, we can identify key donor profiles and trends in UK legacy giving today.



Residual giving values Increased in 2021 by around **7%** due to an increase in the number of charitable estates

The average legator writes their will aged **78**

Legacy income is now worth over **£3 billion**

17.1% of the value of charitable estates were left as charitable bequests in 2021 (£3.3bn from estate values of £19.6bn)

6.4% of the population leave a bequest in a Will (37,242 charitable from over 586,000 deaths in 2021)

How do we help charities?

We have worked with charities across the whole spectrum of legacy income, from those with multi-million pounds of annual legacy income to those just putting together their first legacy marketing strategy. With the breadth and depth of data we have available, we work directly with each charity to recommend research that will help them identify the most useful legacy opportunities. We do this through:

- Causal area benchmarking
- Geo-mapping opportunities
- Identifying bedfellows/co-beneficiaries
- Income benchmarking
- Historical performance comparisons

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Consultancy Reports

Bespoke reports

The data gathered through our Will-reading service allows us to work with charitable organisations across the UK to help better understand their legacy giving income. Bespoke projects range from sector-wide analysis of co-beneficiaries and causal giving, to benchmarking data against select charities.

The Benefit

Our decade of data is the most comprehensive available in the UK, covering the bequests left to over 37,000 charities. Using our data, charities can view a complete picture of their legacy landscape and base their research on our existing frameworks or work with our team to come up with a solution tailored towards their goals.

Causal area reports

Smee & Ford split data into 21 causal areas to define at a top line level when producing national trends reports. This means we can produce detailed reports for charities that give a deep understanding of what is happening within a specific casual area.

The Benefit

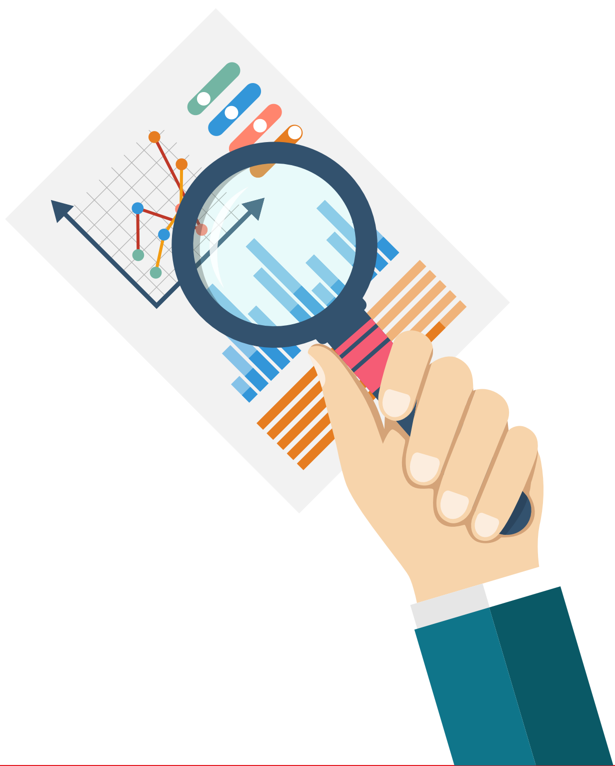
Showing what giving looks like from legators who have an affinity with a cause can be invaluable when putting together future strategies; showing areas of geographical strength, age groups that typically give to similar charities and the types and value of bequests peer charities are receiving.

Regional reports

Charities often have a regional focus - either for their charitable work or their donor acquisition. Because of this, we can produce standardised regional reports for charities based on select postcodes or counties to show the complete legacy landscape for their chosen area.

The Benefit

The interactive report and raw data sheet combined show all legacies that have been left to charities within a defined area, allowing the ability to see general giving trends, as well as how they relate to postcode areas and causes. This regional intelligence can be key when forming a legacy strategy for your charity.



Contact us today for bespoke insight into your potential legacy pool:

Email: david.baldock@wilmingtonplc.com Phone: 0207 374 5248

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Case Studies

Understanding co-beneficiaries

A large medical charity wanted to understand how their legacy strategy stood against their peers'. We worked closely with their senior legacy team to establish a view of the legacy landscape that would help them progress most effectively. We focused on the size of the legacy pool and their place within it and profiled donors to benchmark with similar charities and the entire sector.

Results

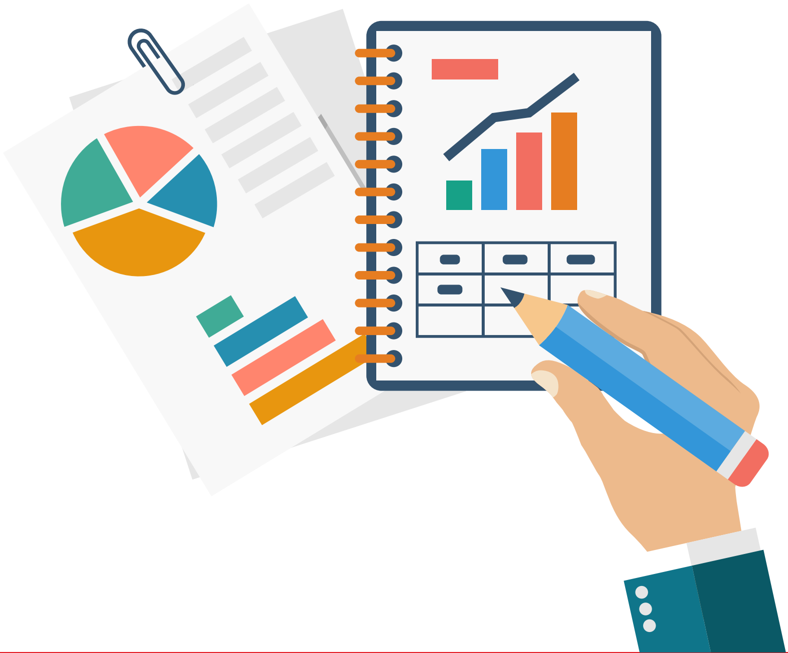
Our findings uncovered that this charity were being pigeon-holed into one causal area when actually their work covered much more. We suggested additional research around their bedfellows' bequest values in comparison to theirs. The results of this showed that the charity were not being recognised for the full scope of their work. This has helped to define a clearer marketing strategy by identifying larger audience opportunities, showing potential charities to work with in joint marketing ventures, and enabling the charity to become more forthcoming in their messaging.

Analysing giving across generational cohorts

Recent Smee & Ford research demonstrates how legacy income breaks down across generational cohorts. From this research we were contacted by a top 10 charity, concerned about being too focused on a specific age group. By digging deeper into their strategy, we could understand the volume, type and value of their bequests to analyse how their current strategy fared within their causal area.

Results

Our findings showed success amongst a couple of age-groups they hadn't considered; 'Baby Boomers' and 'Millennials'. Two new marketing plans were then implemented to build relationships with these groups, to put them ahead of other charities in their causal area.



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Changing the way you think about data

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Our data is provided to you on an easy-to-use interactive dashboard. Through this tool, you can:

- Create a multitude of customisable views
- Rearrange how the data is presented
- Highlight and delve into specific areas of interest
- Develop a bespoke strategy based on what is meaningful for your charity

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Marketing Solutions

Smee & Ford is the UK's leading provider of trusted legacy information. Most known for our legacy notification service, we ensure that charities receive timely information on specific legacies left to them, or notification of money left in wills or trusts for unspecified charitable purposes.

By utilising this information, Smee & Ford are able to provide unique data and marketing solutions to help charities analyse and understand their legacy giving records in order to make informed decisions and drive their activities.

Instead of using assumptions we use our exclusive database which contains information across the entire UK legacy market; we look at this in granular detail to derive personalised insight that can help charity's identify opportunities and areas of growth. Marketing solutions combines the expertise of advertising with our legacy sector knowledge, to enable you to increase your reach to potential legators.

To find out more email: david.baldock@wilmingtonplc.com.