

IT'S YOUR CONFERENCE

FIA CONFERENCE 2022

YOUR PASSION • YOUR PEOPLE • YOUR PLACE



Ensuring Gifts in Wills Success

No matter your size or budget.

GIFTS IN WILLS

Ellaine Hislop

Surf Life Saving Western Australia

SPONSORED BY



WHY ME?

- 25+ years as a fundraiser
- Developed fundraising programs, including GIW, from scratch
- Grown existing GIW programs
- Sometimes with no or minimal budget for GIW
- Worked within one person fundraising departments, and larger teams



HOW?

STEP 1
- Prepare -

STEP 2
- Promote -

STEP 3
- Progress -

HOW?

STEP 1

- Prepare -

research

policy & procedures

why

STEP 2

- Promote -

who

how

what

STEP 3

- Progress -

plan

actively seek

extras

What did SLSWA do?

Step by step...

From no donors
& no GIW program

-

To 'Wave of the Future'

-

Confirmed bequestors

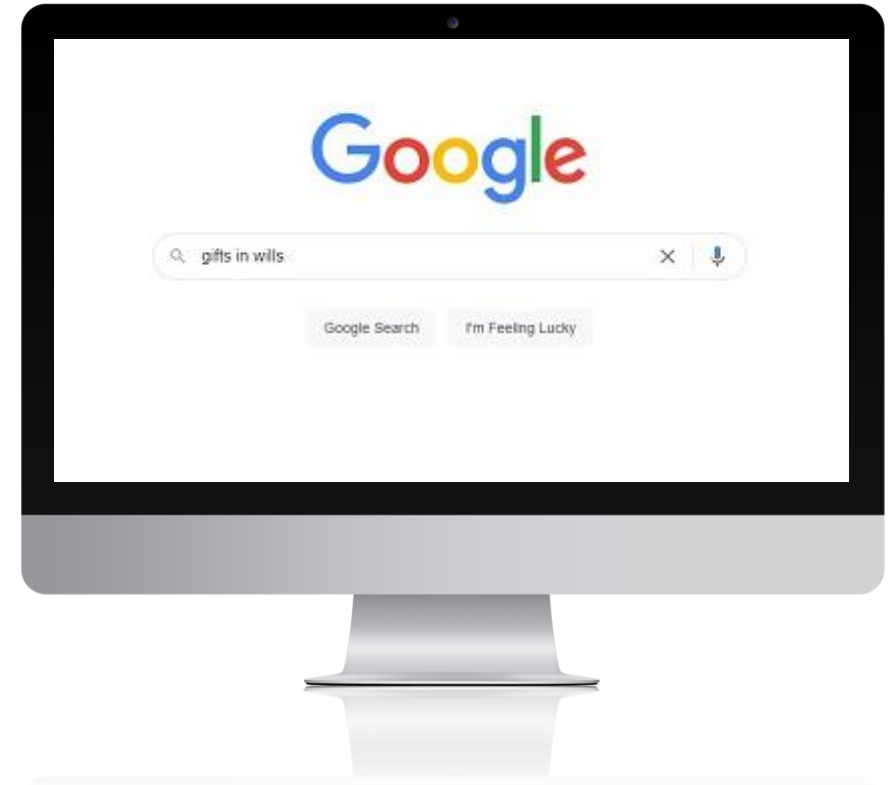
Pipeline of prospects



RESEARCH

Get a feel for how other programs work
Review other organisations
Collect brochures
Courses, webinars, books, e-news
Connect with colleagues

Step 1 Prepare



Step 1

Prepare

Move forward with clarity

Include:

purpose of program

gift acceptance

wording

using funds

promotion

acknowledgement

**POLICY &
PROCEDURES**

WHY

Why should someone leave a legacy

Questions: motivation, what matters to them, what do they want to live on, how can they leave the world a better place

Step 1 Prepare





Step 2

Promote

WHO

Inner circle

People close to us

Current or past board, staff, volunteers

Current donors - already giving

Committed supporters



Step 2 Promote

WHO



Benefited from service
Trust us
Believes in us
Loyal



HOW

DM appeals

Step 2 Promote

NATIONAL AUSTRALIA BANK BEACH SAFE

YES! I will help make sure our lifesavers are always rescue ready.

STEP 1 Please check your details and provide any corrections below:

Please contact me about leaving a gift in my Will.

Please remove me from your fundraising list.

STEP 2 Ways to donate:

Online
mybeach.com.au/
donate

Phone
08 9207 6677

STEP 3 Please accept my/our donation of:


\$38 \$25 \$50 My Choice \$ _____

STEP 4 Payment method:

HOW

DM appeals
Website

Step 2 Promote



The screenshot shows a website for Surt Life Saving WA. The navigation menu includes: MY BEACH, COASTAL SAFETY, GET INVOLVED, MEMBERS, COURSES & PROGRAMS, HOW TO SUPPORT, and ABOUT. The main heading is "Save Lives in Your Will". Below this is a circular image of two lifeguards in yellow and red uniforms carrying a person on a stretcher on a beach. To the right of the image is the text: "Join the Wave of the Future today! Your legacy will help save lives and preserve Aussie lifestyle for future generations. In 1909 volunteer surf lifesavers started patrolling beaches - risking their own lives to save others. Generous people like you in our community have this vital volunteer work to ensure our iconic life continue to save lives on WA beaches. By leaving a gift to Surf Life Saving WA in your will, you not only be saving lives in the future but protect West Aussie lifestyle." At the bottom, it says "You will make a difference" and "Future generations have had the luxury of enjoying safety at our stunning WA beaches. The memory of the hot sand as you trooped over the dunes. Looking forward..."

HOW

DM appeals

Website

Newsletters

Step 2 Promote

A LEGACY TO KEEP FUTURE GENERATIONS SAFE



As a member of the SLSWA Board, Jarod Stone knows first-hand the incredible impact Gifts in Wills have on the future of life saving in Western Australia. When Jarod's second son Louis was born, he and his wife updated their Wills and decided to include a gift to SLSWA.

After nine years on the Board Jarod has seen the impact of both the volunteers and the people who support them:

"While there are a lot of people that wouldn't be around without Surf Life Saving, SLSWA delivers so much more than rescuing people caught in rips. Although protecting people at the beach is our core focus, there are considerable community benefits delivered by SLSWA beyond patrolling between the red and

are utilised. They allow us to look at a horizon much further ahead – the long-term benefits to Surf Life Saving and the community are enormous."

As Jarod had seen firsthand the benefits of Gifts in Wills, he knew that he could make an impact too.

"It was time for a review of our wills – and it really was the right time and right place kind of situation. I know that my family will be well taken care of if anything should happen to my wife or I. I'd seen the impact a bequest of any size can have on a community I care about, so while reviewing our wills we chose to include a gift to SLSWA – it was incredibly easy to do.

"For others considering this type of gift, my advice would be the best time is when you're already planning to look at your will

HOW

DM appeals
Website
Newsletters
E-news
Email signatures

Step 2 Promote

ent: Thursday, 31 March 2022 9:36 AM
cc: Elaine Hislop <ehislop@sllsua.com.au>
Subject: Protect your loved ones

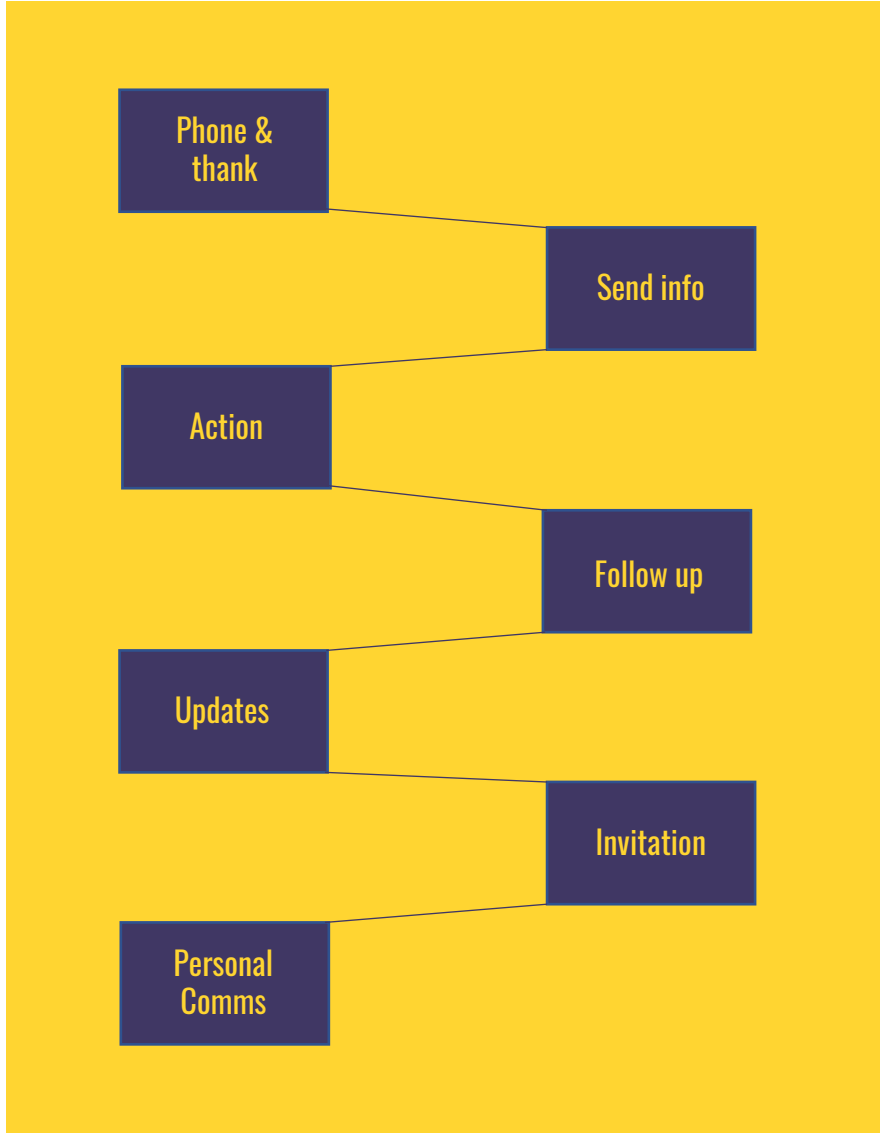
Join the Wave of the Future!

[View this email online](#)



Write a Will today to
Join the wave of the future.

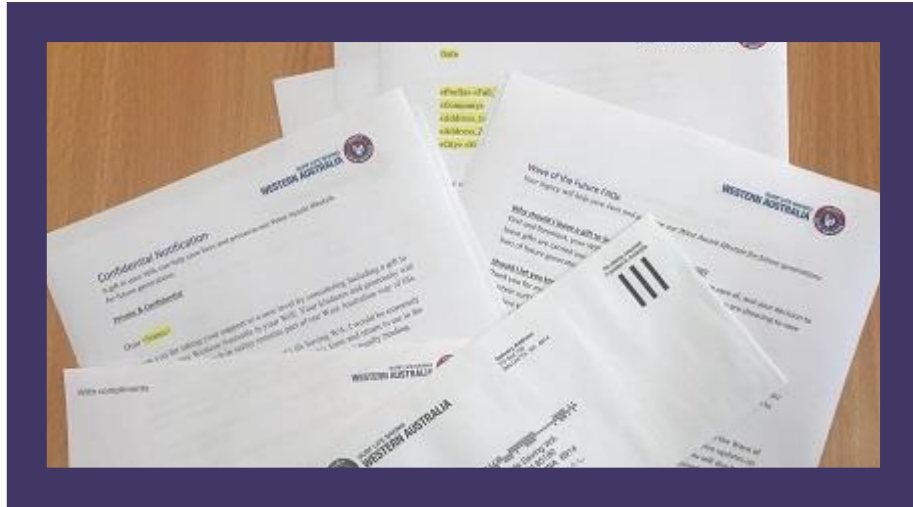




Step 2 Promote

WHAT

Step 2 Promote



Phone
Letter
Response form
Handwritten
Reply envelope

WHAT

Step 2 Promote

Your Gift

Please check below as appropriate

- <I/We> have included a gift to Surf Life Saving Western Australia in my Will.
- <I am/We are> considering including a gift to Surf Life Saving Western Australia in my Will.
- <I/We> would like to discuss this further. Please call me on:
_____ (*ph*)
- <I am/We are> not considering including a gift to Surf Life Saving Western Australia in my Will at this time.

FAQs

Call to action
Response form
Personalise
Testimonial

WHAT

PLAN

Build your GIW comms plan
Start with what is already in place
& then add in what you can

Step 3 Progress

GIW Communications Calendar

January	February
Summer Appeal W2 <i>Donation form option</i>	Newsletter <i>Include a GIW story</i>
March	April
GIW DM Campaign <i>Lead generation</i>	Donor Report <i>Handwritten note</i>
May	June
Tax Appeal W1 <i>Donation form option</i>	Tax Appeal W2 <i>Donation form option</i>
July	August
Newsletter <i>Include a GIW story</i>	GIW TM Campaign <i>Lead generation</i>
September	October
Supporter Survey <i>Include GIW id option</i>	Impact Report <i>Handwritten note</i>
November	December
Engagement Event <i>Behind the scenes tour</i>	Summer Appeal W1 <i>Donation form option</i>

Step 3 Progress

SEEK

Survey

Gifts left to SLSWA by people in their Wills are a wonderful legacy that help save lives and preserve our West Aussie lifestyle for future generations. Many supporters have made the generous decision to include SLSWA in their Will or trust.

8 Which of the following best describes you?

- I have already included SLSWA in my Will
- I intend to include SLSWA when I make or revise my Will
- I would consider this type of gift and would like more information
- I have a Will and have mentioned other charities but I have not included SLSWA
- I do not have a Will
- I have written a Will but not included a charity
- It's not something I'm interested in right now, thank you

8 In the past, you told us that you weren't interested in leaving a gift to SLSWA in your Will. Have you changed your mind about this since we asked you last?

- Yes, I have now included SLSWA in my Will
- Yes, I would now consider this type of gift and would like more information please
- I still don't have a Will but might consider it

8 In the past, you told us that you were considering leaving a gift to SLSWA in your Will. Which of the following best describes you now?

- I have included SLSWA in my Will
- I intend to include SLSWA when I make or revise my Will
- I am still considering including SLSWA when I make or revise my Will
- I would like to discuss this further with you

8 In the past, you told us that you made the very generous decision to include SLSWA in your Will. Would you be willing to share the reason for your decision with us?

- Yes, please contact me

Step 3 Progress

SEEK



Survey
Events
DM campaign
TM campaign

EXTRAS

Step 3
Progress

Brochure
Staff
Society
And more

NOT THE END
Still more to come

Where are we now...

YOUR **PASSION** ◦ YOUR **PEOPLE** ◦ YOUR **PLACE**



Wave of the Future

Save lives and preserve our West Aussie lifestyle for future generations with a gift in your Will.





THANK YOU

*Thank you for caring about
the West Aussies of tomorrow.*

THE IMPACT OF YOUR LEGACY

Our volunteer lifesavers are such a vital part of our West Aussie lifestyle. But so are people like you – who support their training and provide the equipment and resources they need to save lives. Like you, we never want to imagine a lifestyle where we're not safe at our wonderful beaches.

Next time you review your Will, please consider remembering Surf Life Saving WA. Your gift can help ensure volunteer lifesavers remain an iconic part of our culture – but more importantly, that they will be around to keep people safe on our beaches for years to come.

Your legacy will help make sure everyone can enjoy our West Aussie beach lifestyle in safety.

SAVING LIVES TODAY

Thanks to supporters like you, our amazing volunteer lifesavers are trained to always be ready to save lives.

When we go to the beach, likely the last thing on our minds is whether we'll be going home safely. We go to cool off in the water, to relax, or maybe to enjoy time with our friends and family.

Former Esperance Goldfields SLSC president Lisa Julian was doing just that one summer evening – enjoying her wedding anniversary celebration at Twilight Cove with her husband and two young sons.

Her evening plans changed suddenly when a member of the public rushed over to her. A teenage boy had slipped off the rocks and into the water. Without hesitation, Lisa sprang into action.

Lisa ran to the scene and drew on her extensive training to quickly assess the situation.

With the rough conditions that day, this type of rescue would usually call for a Jet Ski or rescue boat. But since it was outside of patrol hours, that wasn't an option. Lisa quickly ran to the clubhouse, grabbed a surf rescue board and swam



"Thanks to the quick actions and bravery of the lifesavers you support, people like this young man get to go home safely to their families."

out alone to save the young man.

"It was scary, there were really huge conditions," Lisa said. "I just thought 'This is it, I'm going to die!'" But even while thinking this, Lisa didn't stop.

Despite not knowing what she would encounter, Lisa headed out into deep water and around a headland, which was being battered by a large swell and strong onshore winds.

When Lisa reached the boy, he was struggling in the water and waves were smashing dangerously against the rocks. Lisa was able to assist the teenager – who was taller and heavier than her – onto the rescue board. Then she began the exhausting swim back to the beach, where they were met by a waiting ambulance crew.

Lisa may be a small person in stature, but her actions showed her amazing strength and

courage. Without her training, experience, and the ongoing support for resources and equipment that special support like gifts in Wills provide, the young West Aussie life she saved might have been lost that day.

Volunteers like Lisa are only making such a life-saving impact in our community today because of the generous supporters of yesterday.

SAVING LIVES TOMORROW

With your legacy, volunteers on West Aussie beaches will remain a part of our lifesaving culture for generations to come.

The first surf life saving club in Western Australia was established in September 1909.



Part of a great tradition that echoes across the past 100 years.



Surf lifesavers are men and women, young and old. They are passionate about their beach and their community.



Surf lifesavers test and hone their skills, ensuring they have the discipline and competence they need to save lives.

JOIN OUR WONDERFUL COMMUNITY

Volunteer surf lifesavers have been part of our West Aussie culture since 1909 when the first patrol members risked their own lives to save others. Since then, generous people in our community have supported this vital volunteer work, to ensure our iconic lifesavers can continue to save lives on WA beaches.

Thanks to the generosity of supporters who leave a gift in their Will, we know we will always have enough funds on hand for our passionate volunteer lifesavers to undergo training, in and out of the water. They also give us the ability to plan ahead to make sure our equipment is always up to date, and our surf lifesavers have everything they need to provide emergency first aid and save lives year after year.

Our volunteer lifesavers keep us safe and keep us alive – and with your support, they'll keep our future generations safe, too.





YOUR QUESTIONS ANSWERED

How do I leave a gift in my Will?

After taking care of your family and loved ones, you may decide to include a gift in your Will to your chosen charitable organisation. We suggest that you seek advice from a lawyer when drafting your Will. The wording is very important, and your lawyer can advise you about the different types of gifts and what is best for your circumstances.

What details do I need to include a gift in my Will?

To provide a gift to SLSWA in your Will, you may need the following details:

Legal Name:
Surf Life Saving Western Australia Incorporated

Address:
7 Delawney Street, Balcatta WA 6021

ABN:
38 926 034 500

Should I let you know I've left SLSWA a gift in my Will?

We value your privacy, so you don't have to tell us you've left a gift in your Will. But if you do let us know, we'll be able to give you our heartfelt thanks now. You'll also be welcomed into the Wave of the Future community – and if you want us to, we'll send you updates and invitations so you can see the impact of support just like yours.



SEEK ADVICE FROM A LAWYER
WHEN DRAFTING YOUR WILL

Can I include my preferred club in my Will?

Your gift to Surf Life Saving Western Australia will assist our wider West Australian community, but you may have a specific Surf Life Saving Club you would prefer to support with a gift in your Will. Surf Life Saving Western Australia will distribute 100% of your gift to the club of your choice. Contact us to find out how to nominate your preferred club to receive your gift.

How can I get more information?

To request further information or get sample wording to use when drafting your Will, please contact SLSWA's Donor Care team for a confidential discussion.

Every gift has value, no matter how large or small.



A GIFT IN YOUR WILL IS EASY
TO SET UP AND HAS A LASTING
IMPACT

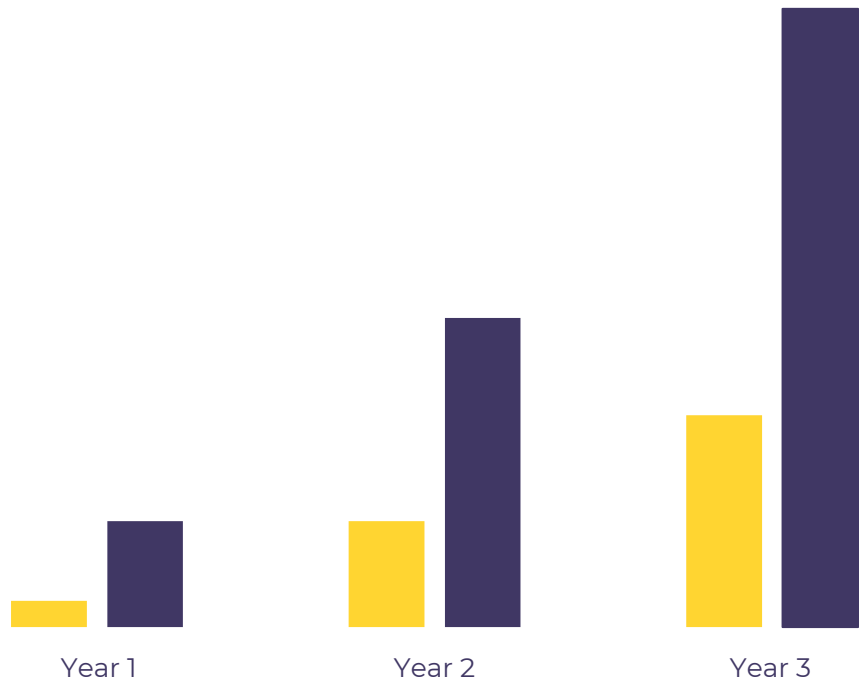
FOR MORE INFORMATION PLEASE CONTACT SLSWA'S DONOR CARE TEAM
call 08 9207 6677 email fundraising@slswa.com.au web mybeach.com.au

Thank you for considering including a gift to Surf Life Saving WA in your Will. Your amazing legacy will help save lives and protect our West Aussie lifestyle for generations to come.

" In 1955, surf lifesavers rescued myself and my girlfriend at City Beach. We've been married for over 60 years thanks to their actions that day " - HARRY



Where are we now...



Two years later

Now into our 3rd year

Confirmed Prospects

Ellaine Hislop
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THANK YOU

IT'S YOUR CONFERENCE

GIFTS IN WILLS TRACK SPONSORED BY

