


A FUTURE WE BUILD TOGETHER

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Strategies to grow your Bequest program and work through the ambiguity of income predictability.

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The importance of a good living pipeline and data hygiene.

Data Hygiene is:

- Knowing information in database is correct
- Not duplicated
- 1 pipeline level active at any one time
- Households/couples managed cohesively for effective communication

To protect the integrity of your bequest data, ensure to limit the number of people who have access

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The importance of a good living pipeline and data hygiene.

Living Levels

Lead/prospect:

Supporter who has requested information on how to leave a gift in will.

Intend:

Supporter who has told the organisation they intend to include you in their will.

Confirmed:

Supporter who has confirmed that the organisation is in their will either in person or in writing

Floor Question- Should you ask for a copy or an extract of their will?

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In my experience, it is far better to ask for details of the gift and what the estimated value is.

WHY?

How can we ever begin to estimate what 15% of a supporters' estate is as we don't know all their assets and liabilities.

So, How?

Simply, ask.

Online forms are a great way to passively request this information.

Final Pipeline level:
Confirmed with Gift details provided.

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Confidential response coupon

Your details

FIRST NAME

SURNAME

ADDRESS

SUBURB

STATE POSTCODE

D.O.B.

TELEPHONE

MOBILE

EMAIL

Additional details

I bequeath the future care of my pets to Lort Smith – please register them in the Lort Smith Pet Legacy Program (fill in details on the reverse side of this coupon).

Please tick all that apply

I have already included a bequest to Lort Smith in my Will.

I intend to include a bequest to Lort Smith in my next Will.

I would like to discuss a bequest or the Lort Smith Pet Legacy Program, please call me.

I would like to visit Lort Smith in North Melbourne to see how my bequest would be used, please call me.

I have included

A specific amount \$

Residue (whole)

Residue (percentage) %

Specific investment or item



Home Ever After

Create a Bequest Community.

- Bequest communities are a great way to bring supporters closer to the organisation.
- Engage through personalised newsletters, webinars, briefings and events.
- Create donor journeys with regular touch points to keep them close and engaged.
- Just because you are in their will, doesn't mean it is set-in stone. Other organisations may invest more in Bequest donor care and one day they may review their will and change from 5 charities to 2 or even bequeath their entire estate to just one!



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Where you'll find you highest value bequest supporters

Bequests are a marathon not a sprint.

Your highest value bequest prospects are usually engaged in some way and therefore already ***inside your database.***

Demographics for the ideal candidates tend to be long term donors (regardless of gift size) and really rusted on committed supporters.

Key techniques to uncover these are supporter surveys, check boxes inside appeals and validation emails to move your supporters through your pipeline.

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How moves management differ in bequests to other fundraising channels:



Bequests are passive; therefore, it is uncommon to make a direct bequest ask. It's a journey through the pipeline where at strategic times you ask your supporter to validate their level. It is important where possible to collect supporters' dates of birth so should you ever want to attempt to predict income you can segment supporters by age.

At AWC we include the link to the online form in all communications with unconfirmed bequest supporters. Asking them to join the Copley Circle and get more involved in their lifetime.

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So, how can we take some of the ambiguity out of the bequest pipeline?

Simply ask, this can be passively through an online form or by developing sincere and genuine relationships with supporters.

Most people want to be thanked for their gift so with the right stewardship - they will tell you.

Find the right place to house the GIW value information, then track the growth and value of the program and run analysis with your supporter's date of birth.

Trust me your Board will LOVE this!

You can also use this information to identify your highest value bequest supporters and nurture them deeply into your organisation.

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Example of qualified confirmed bequest pipeline with values:

Level		# Supporters	value
Transformative	\$1m+	38	\$97,880,000
Leadership	\$500k-\$1m	13	\$8,916,000
Principal	\$250k-\$500k	22	\$7,330,000
Major Tier 1	\$100k-250k	30	\$4,580,000
Major Tier 2	\$50k-100k	13	\$768,000
Major Tier 3	\$20k-\$50k	14	\$380,000
Major Tier 4	\$10k-\$20k	10	\$106,000
Mid	\$5k-\$10k	3	\$32,000
Bilby	\$1k-\$5k	4	\$6,500
Total		147	\$119,998,300

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If you get a huge gift confirmed, just like with major donors - call them within 48 hours and thank them.

By having the form and a reason to call, you have the perfect opportunity to engage about their gift and you will be surprised how much they will tell you.

Other tactics:

Online wills platforms are huge right now however they are run at a cost to your organisation (currently more than \$6k annually) and gifts tend to be from people of a younger generation and be of lesser value, so whilst they are great to have in the mix if your organisation has the budget, they aren't critical to a fabulous bequest program.

Questions?

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