



# FIA Conference 2023

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# Gifts in Wills Report 2023

Lucy McMorron  
Gathered Here

**Together, unlimited.**

**TRACK SPONSOR**





# Gifts in Wills Report 2023

Insights from over 15,000 online wills



# Today's agenda

SCAN ME



- 1** Introduction
- 2** Gifts in Wills Report
- 3** Climate Council case study
- 4** Key recommendations
- 5** Q&A

# Nice to Meet You!



## Lucy McMorron

Head of Partner Success,  
Gathered Here



# About us

- Australia's **#1** end-of-life services website
- Started in **2016**
- Head stone, celebrant and **funeral service comparisons**
- Fixed cost **probate**
- **Free online wills**



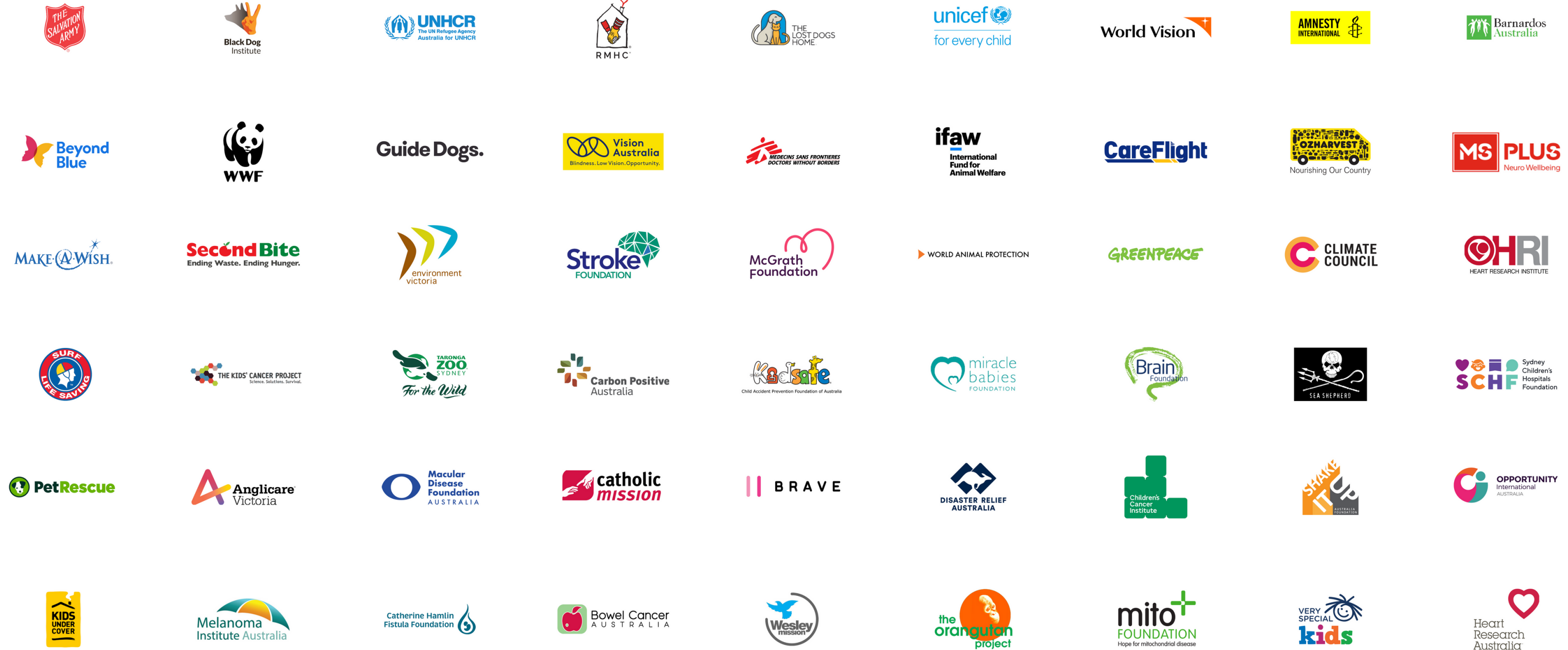


# About us

- 25,000 wills written in two years
- 10% of wills written each year.
- Donations to over 450 different NFPs
- Estimated future value of \$340m
- Meaningful insights into individual gifts, donor demographics, and campaign success



# We work with 200+ charities including...





# Gifts in Wills Report 2023



**15,383** wills over  
12 months



**\$224** million in  
bequests

Trends across age, location, family  
structure, charity cause and more...

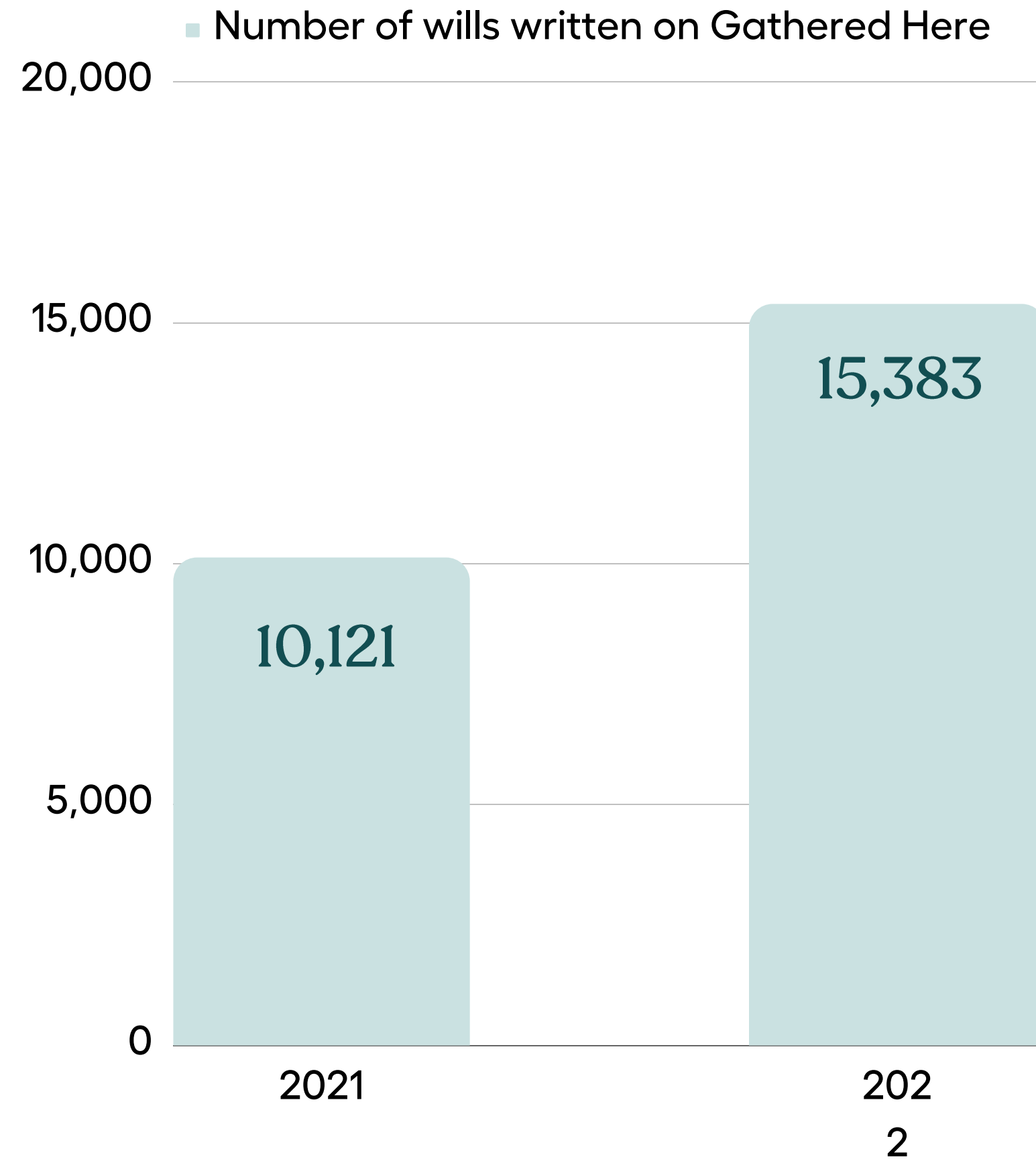


2023

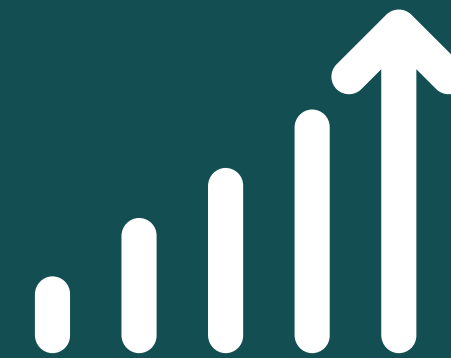
## Gifts in Wills Report

15,383 wills analysed

Data-driven insights into today's will-writers and gift-pledgers



Online will-writing is becoming more popular

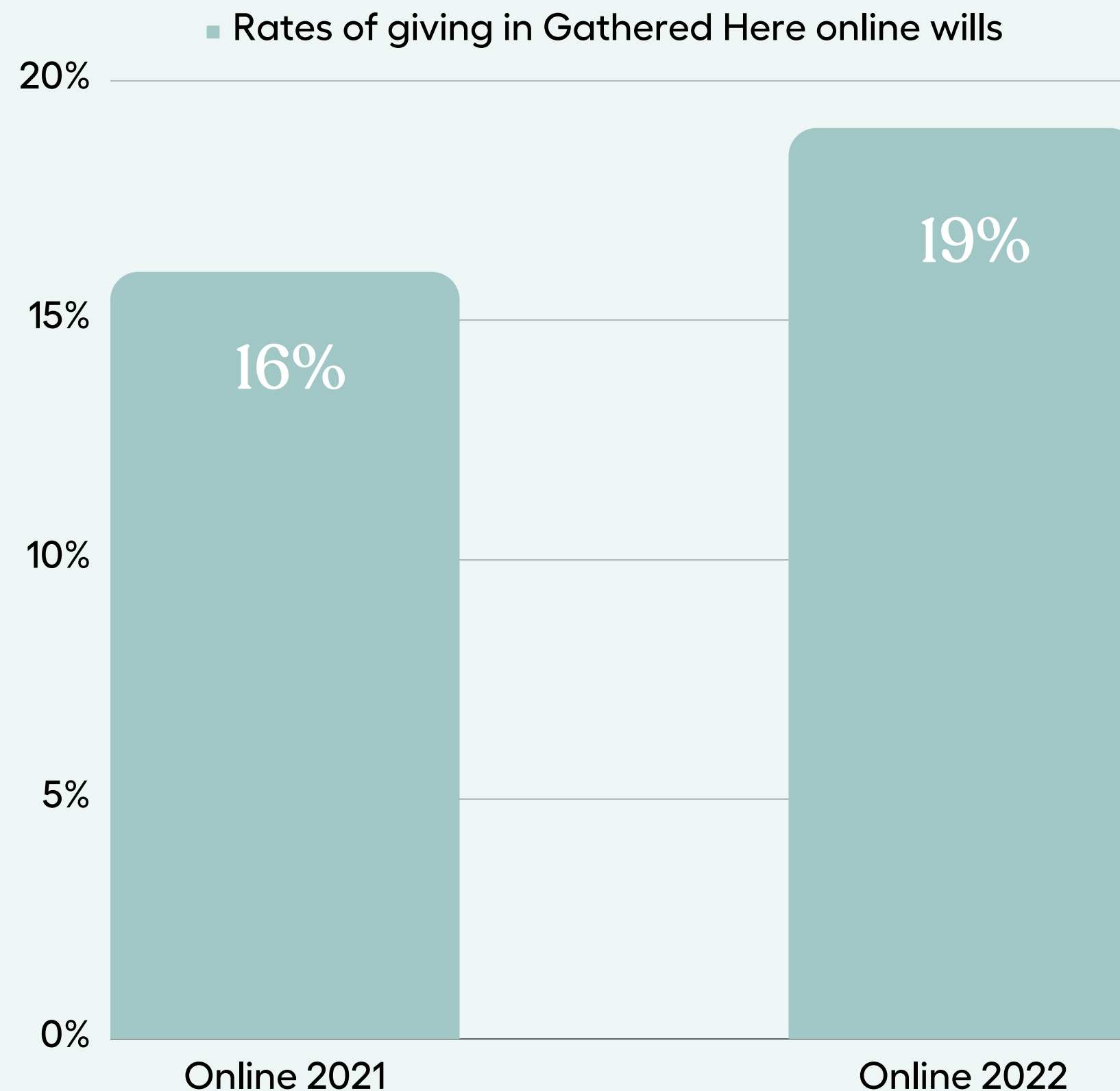


52% increase from 2021 to 2022



Strong growth post-pandemic





## Giving rates are also increasing



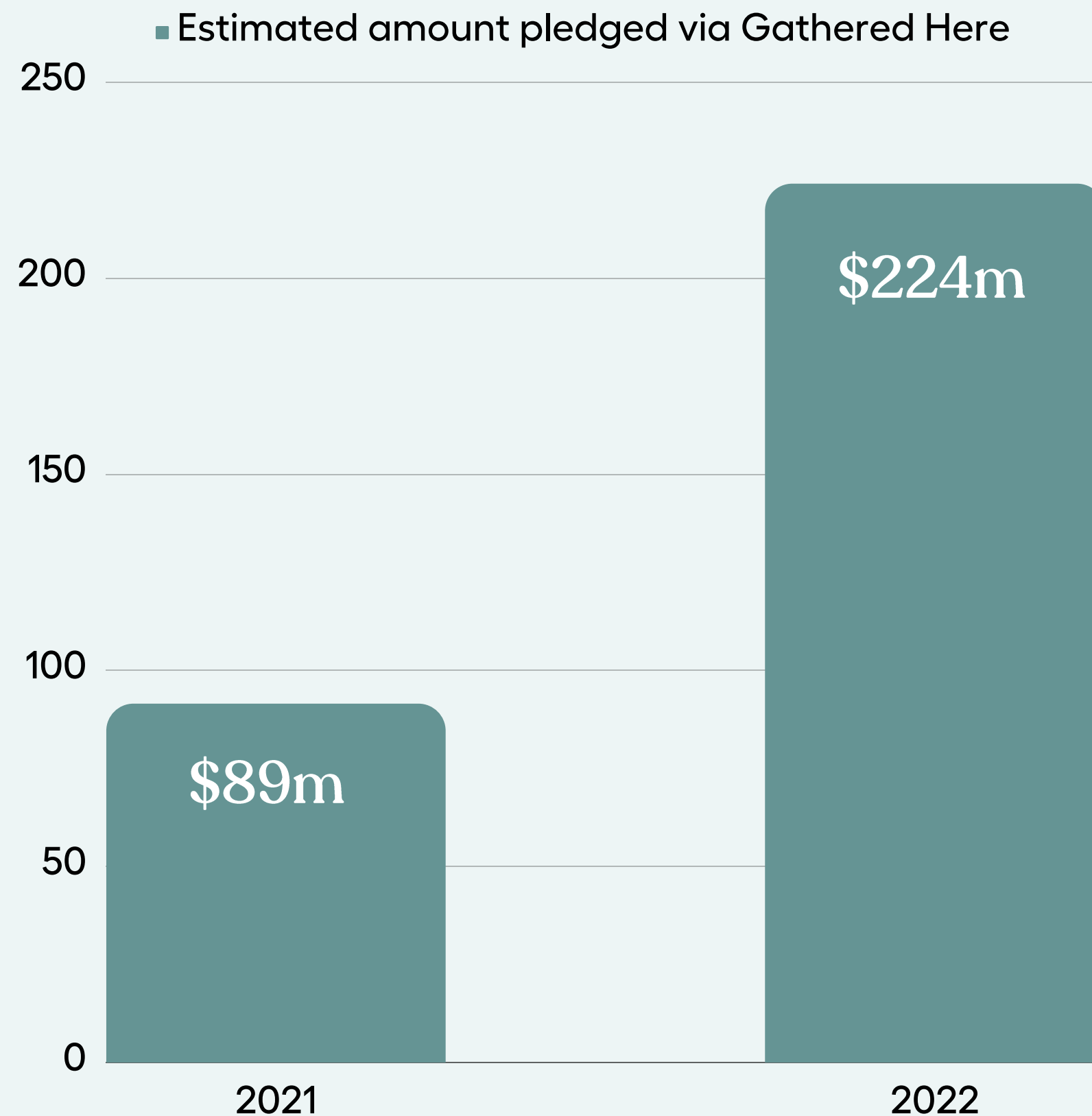
19% increase from 2021 to 2022



2-3 times higher than national average



Online wills are making it easier to pledge gifts



## Overall gift value is going up



152% increase  
from 2021 to 2022



Several factors  
contributing to  
increased gift value



## Average residual gift size is increasing

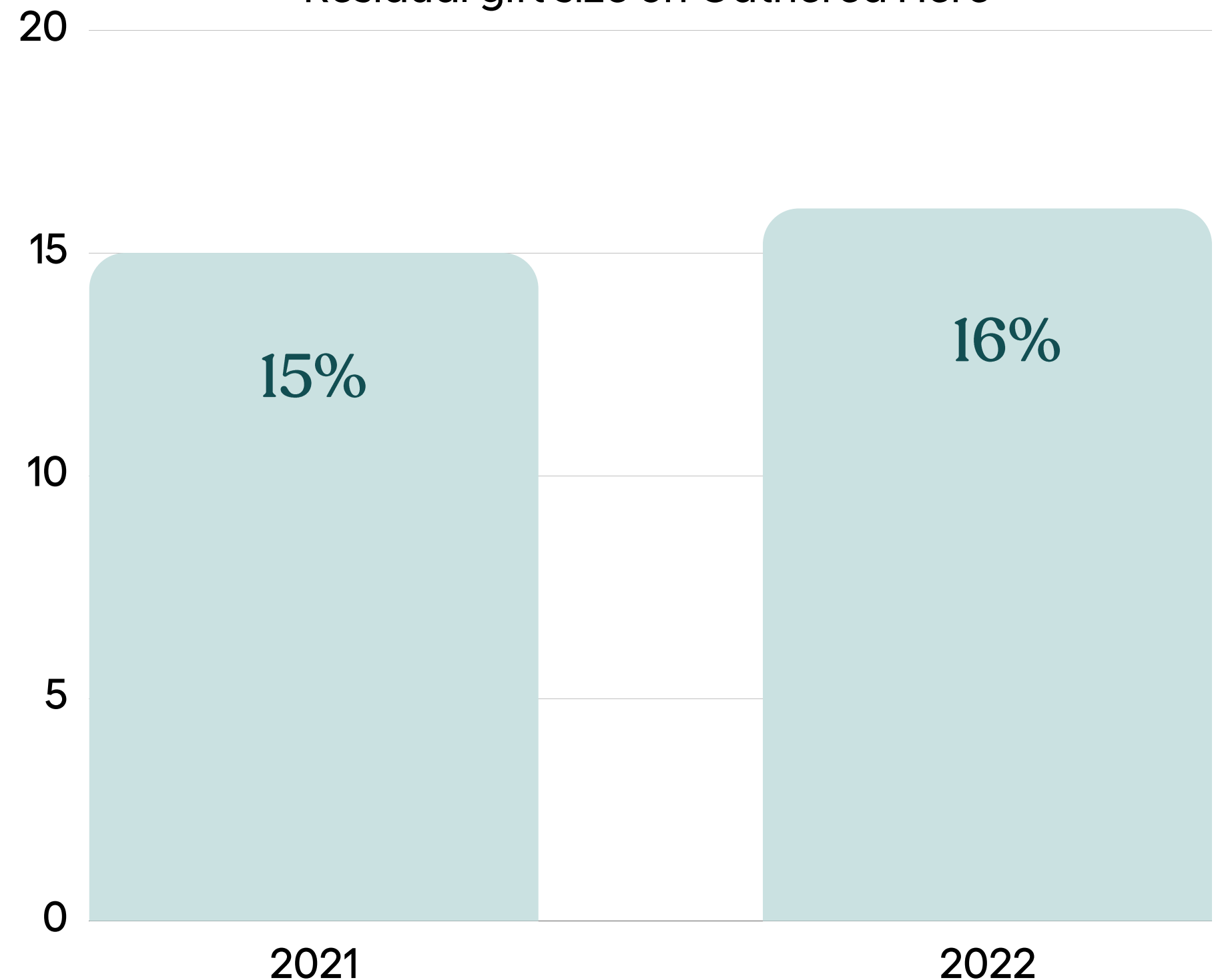
**7%**

growth from  
2021 to 2022

**\$82,903\***

Average residual gift  
worth an estimated

Residual gift size on Gathered Here



\*Based on average estate size \$663, 375 (<https://www.swinburne.edu.au/media/swinburne.edu.au/research/research-centres/csis/documents/Encouraging-Charitable-Gifts-by-Australians-Baker.pdf>)

Online wills include  
more residual gifts

**\$82,903**

Average residual gift

**\$6,488**

Average monetary gift -  
on Gathered Here





## A few will-writers pledged specific items

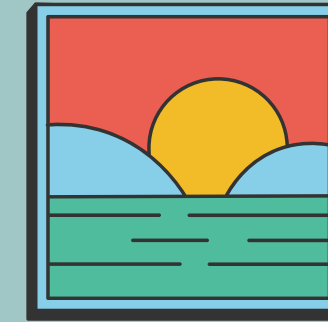
These items provide unique  
insight into the real people  
supporting charities



A mini-cooper



A Yamaha flute



Original artwork



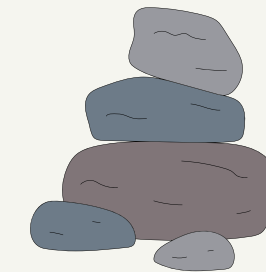
Disability equipment



A rural NSW property



A signed AFL guernsey



A rock collection



Silver bullion



Tools

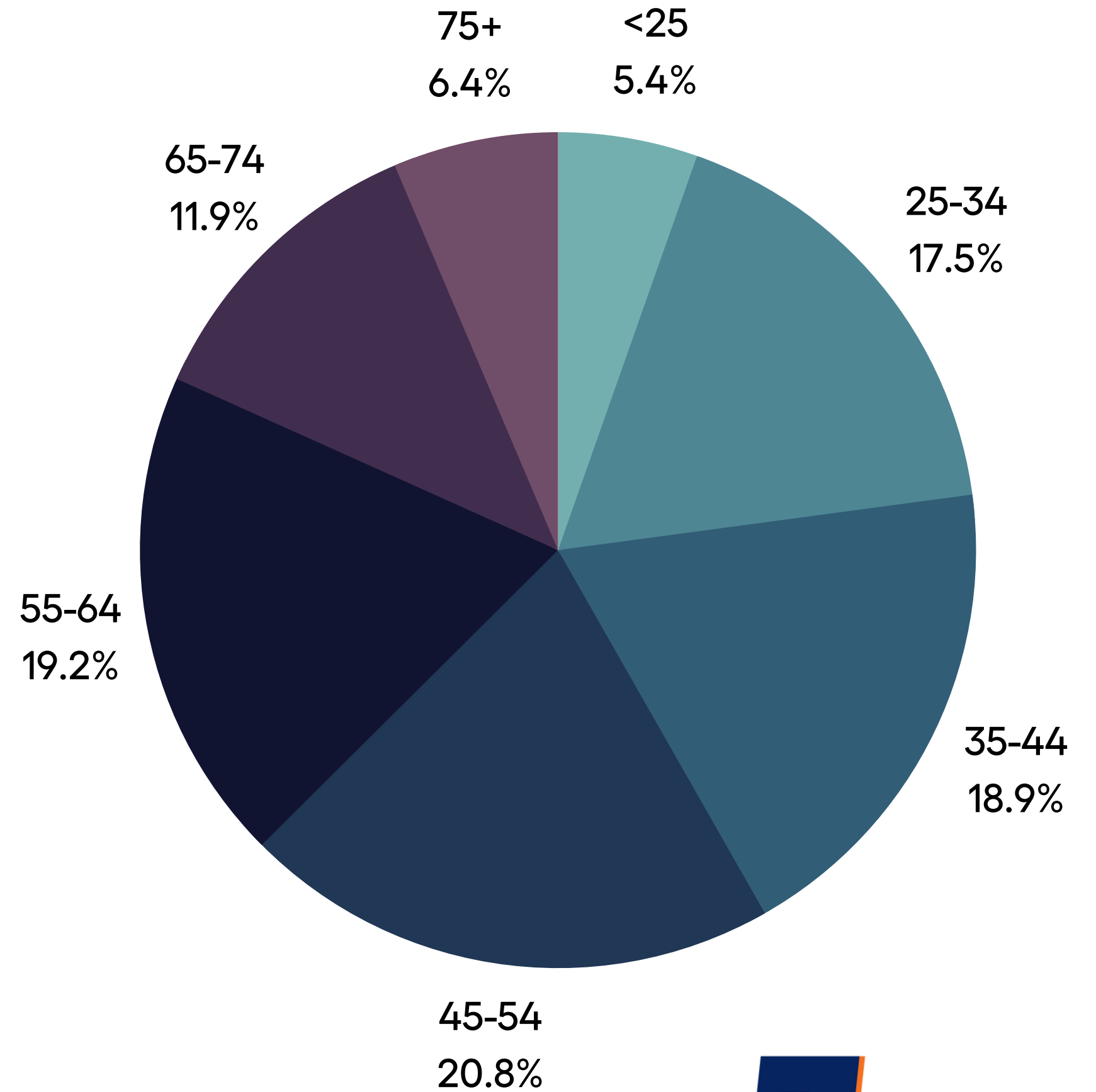
Will-writers were  
aged between 18-101

**45+**

58% were over  
45

**65+**

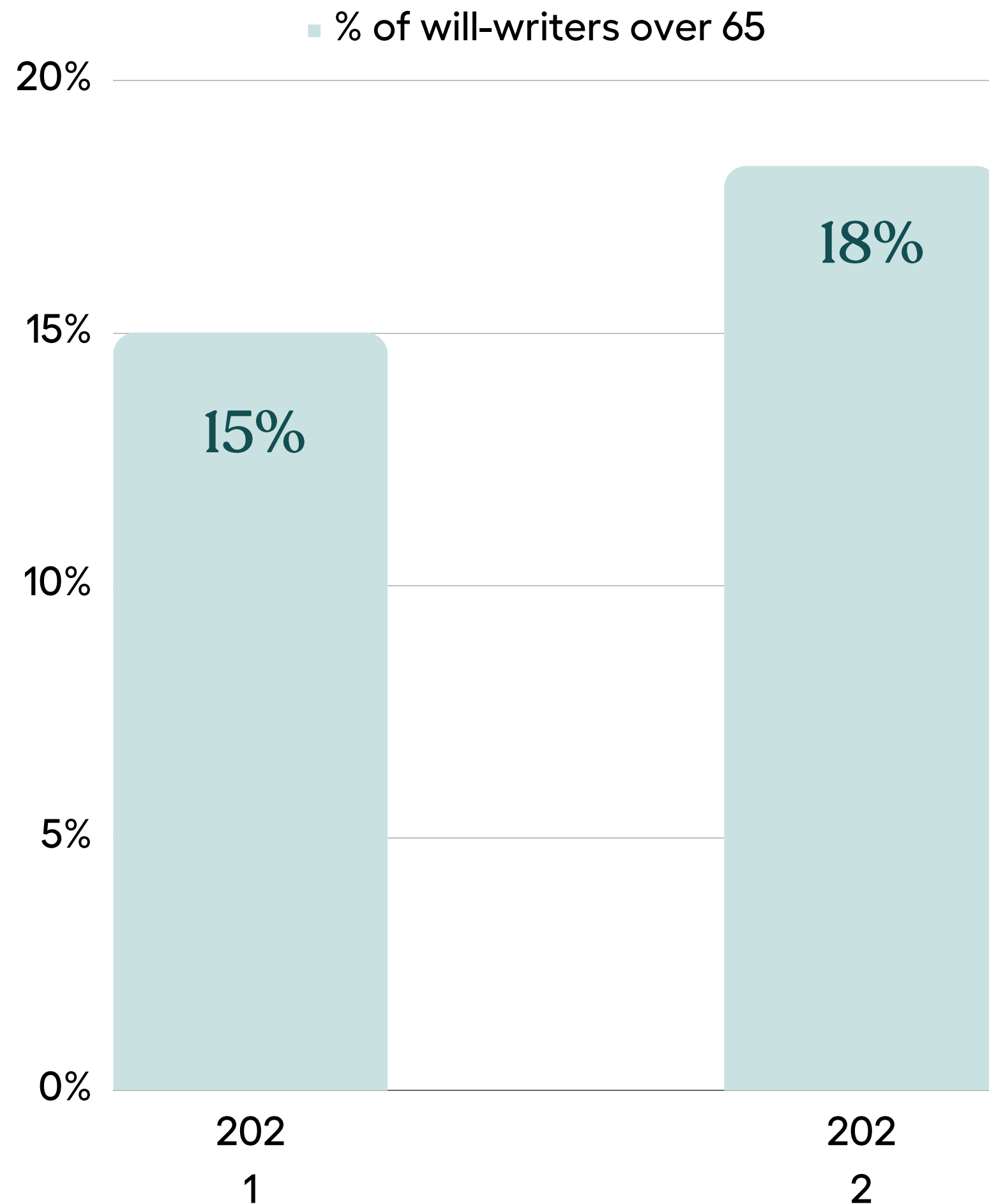
18% were  
seniors



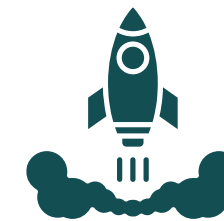
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## Over 65s are embracing online wills



24% increase from 2021 to 2022

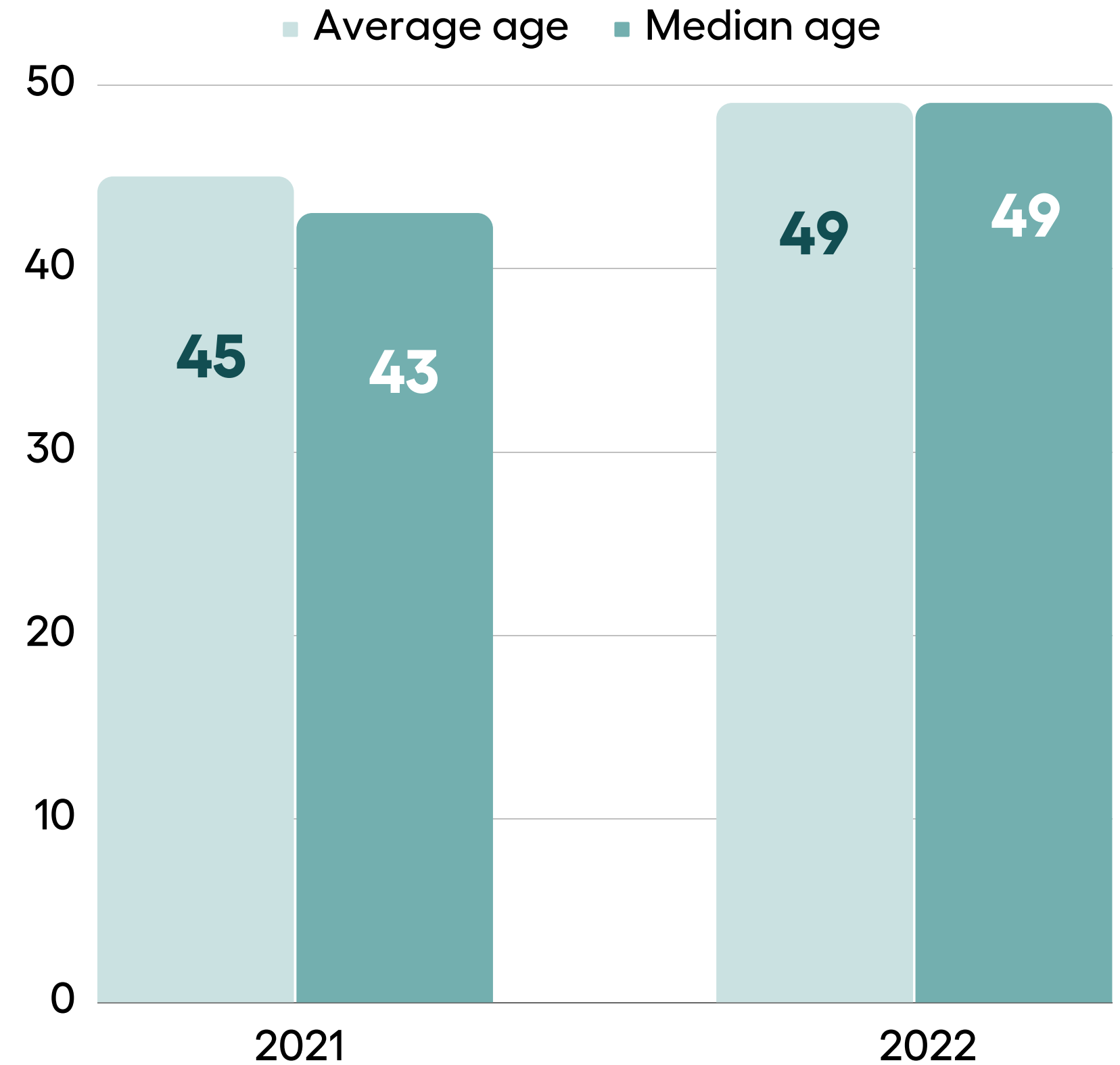


Older generations becoming more tech-savvy

The average age of  
will-writers is  
trending upwards

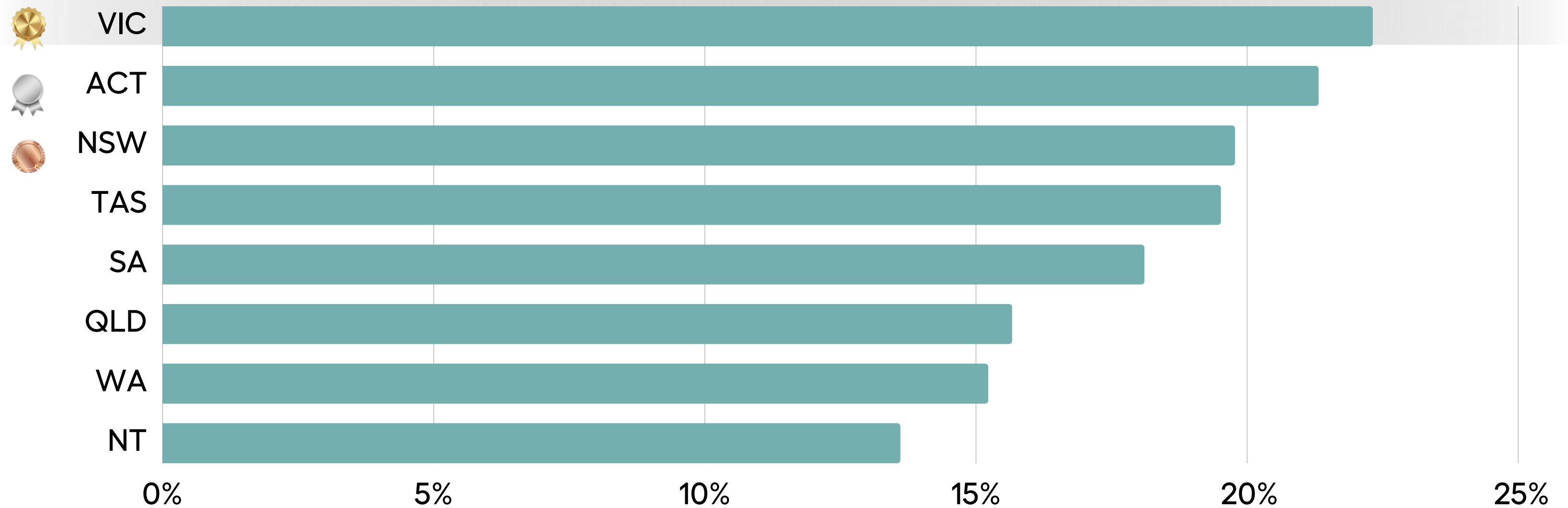


14% increase from  
2021 to 2022



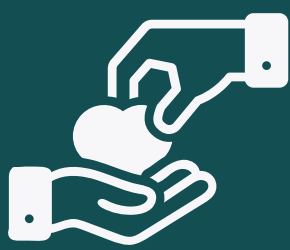
## Victorians have the highest giving-rate

Location data can help measure the success of regional campaigns





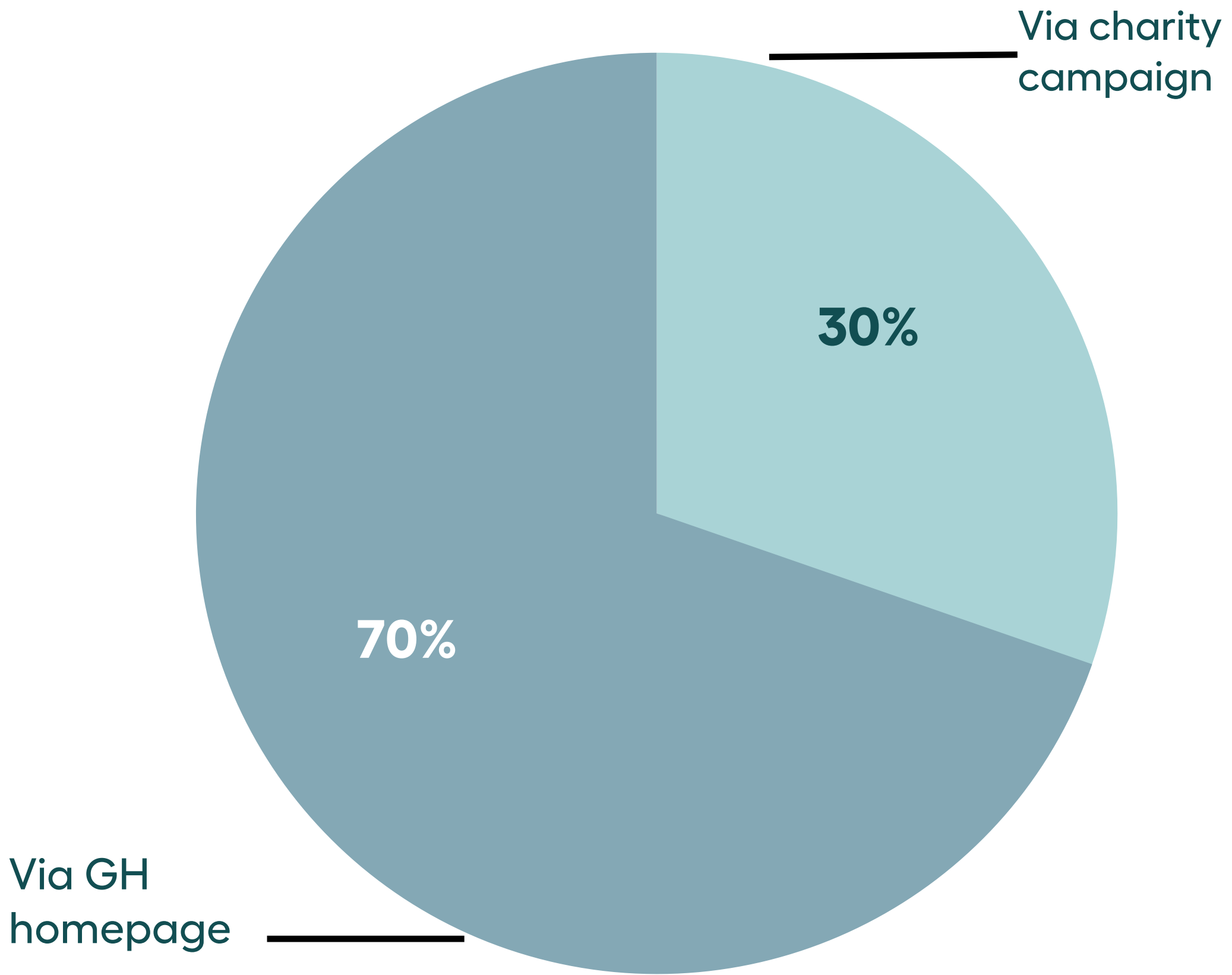
Online wills help charities reach new supporters



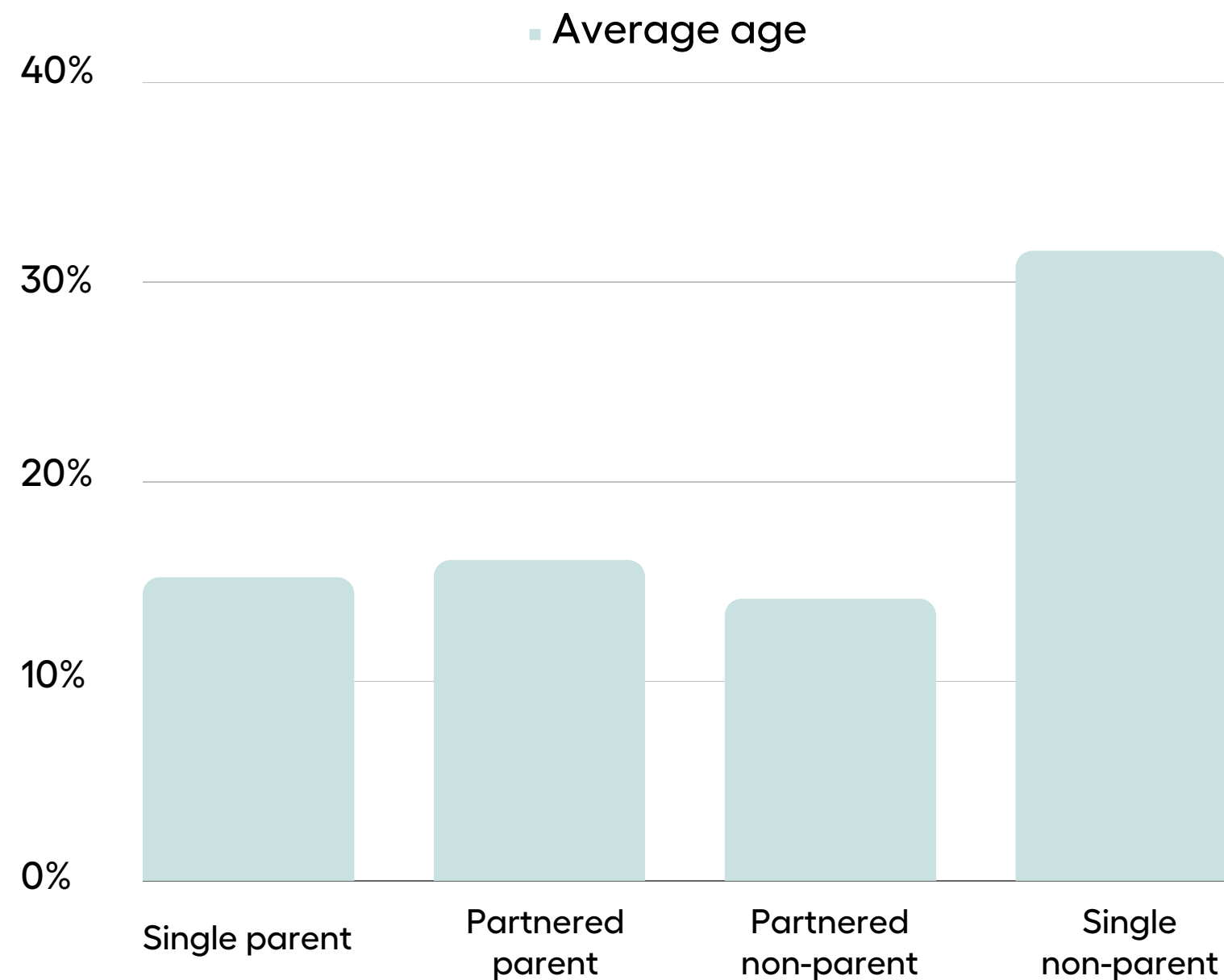
70% of gifts come from unknown supporters



More than half share their contact info

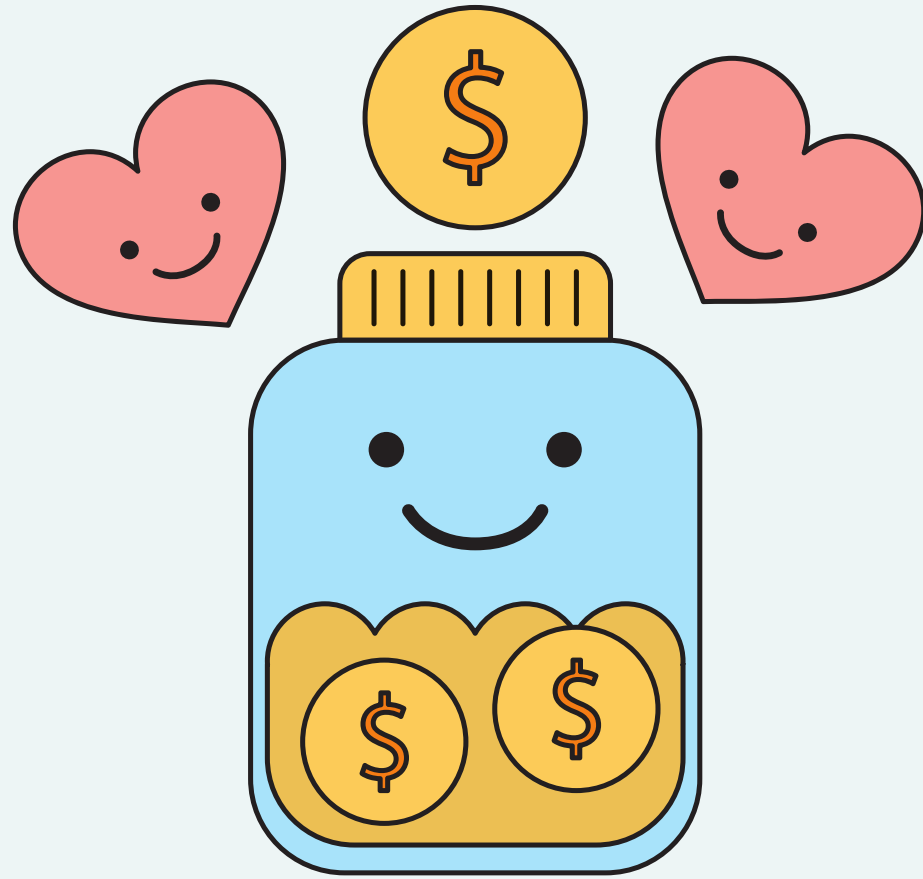


## Single, non-parents have the highest giving rates



**32%**

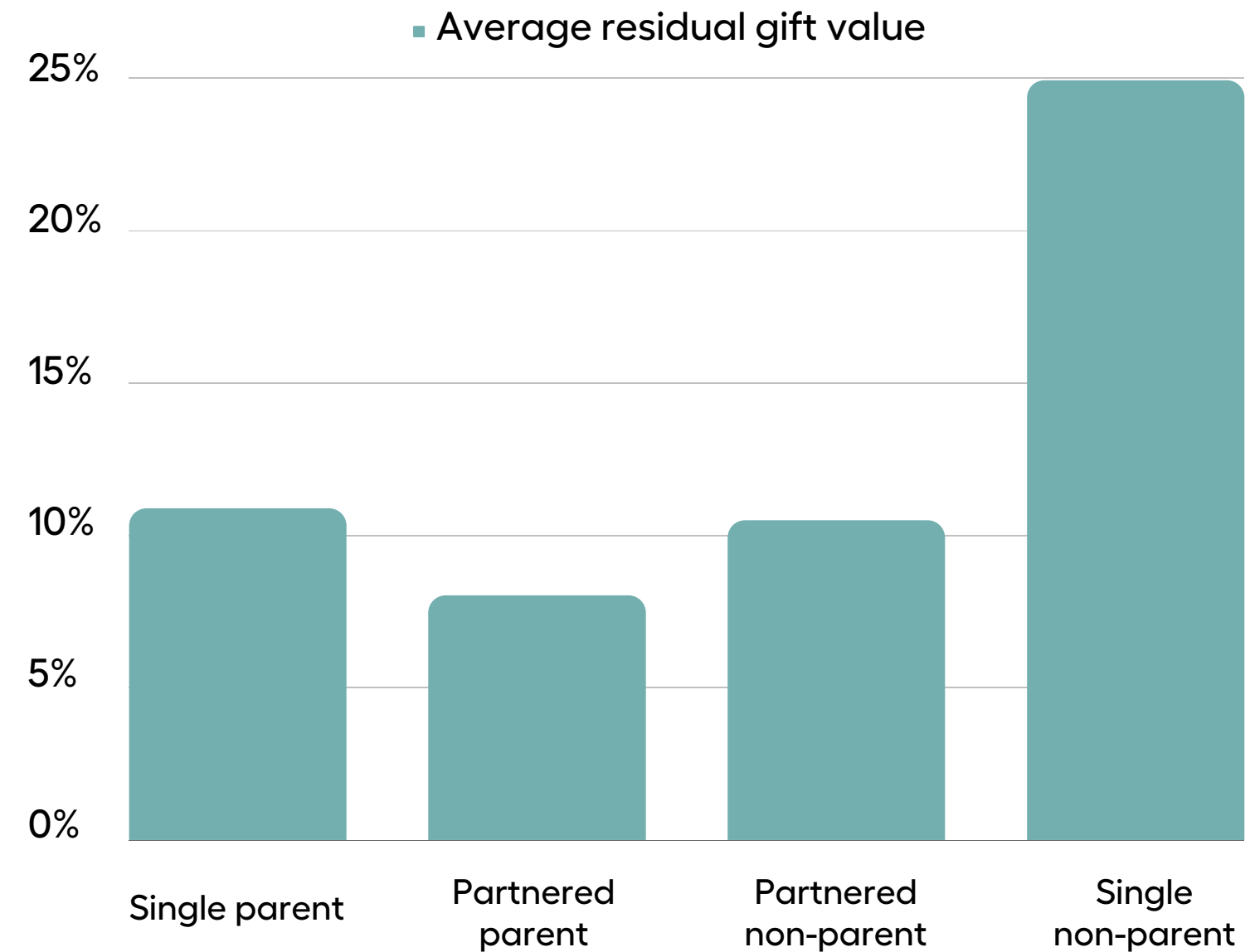
pledged a gift in their will



2x

Residual gifts were 2x larger than other demographics

## Single non-parents also pledged the highest-value gifts



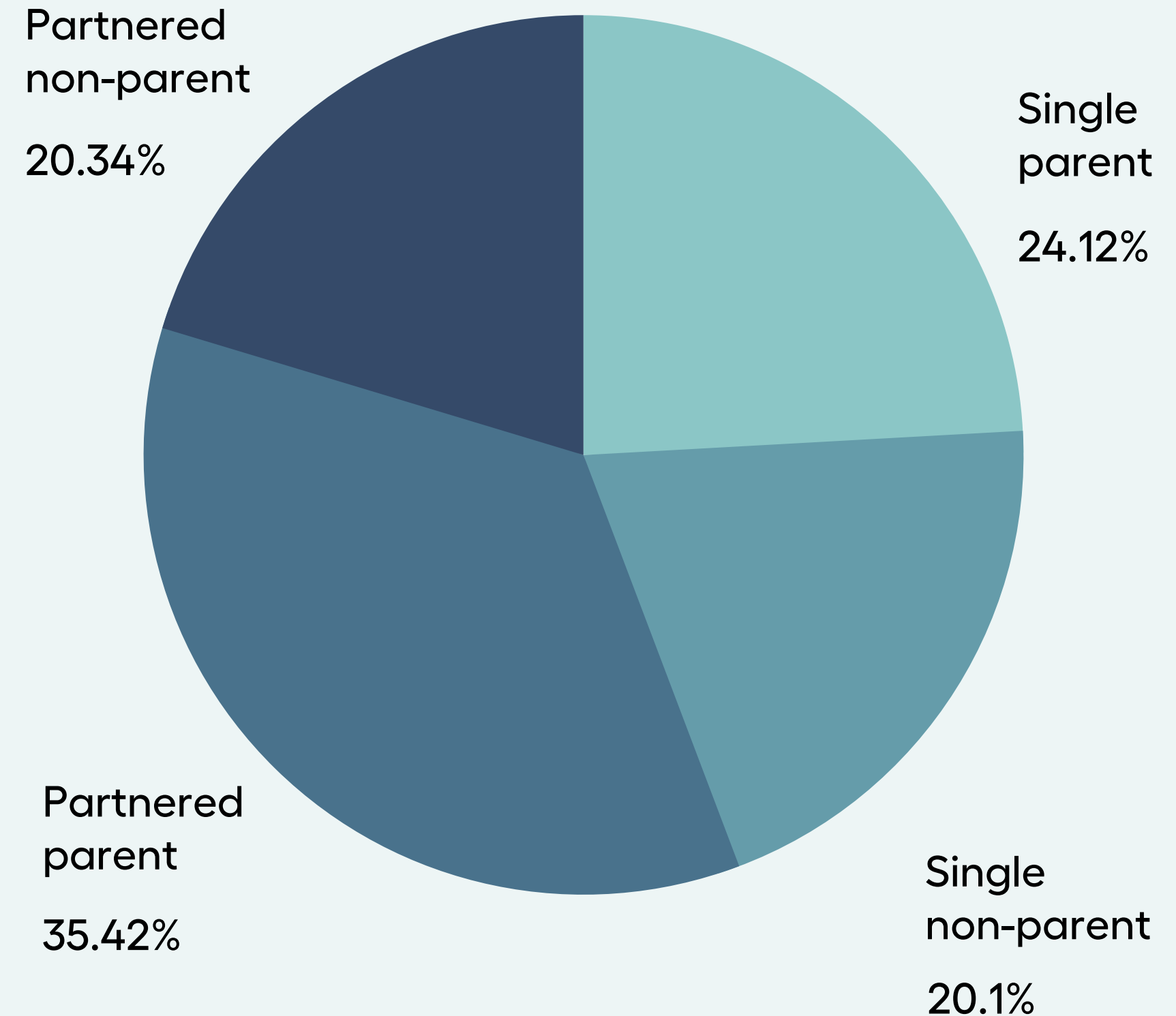
Married or de facto  
parents are the most  
likely to write a will



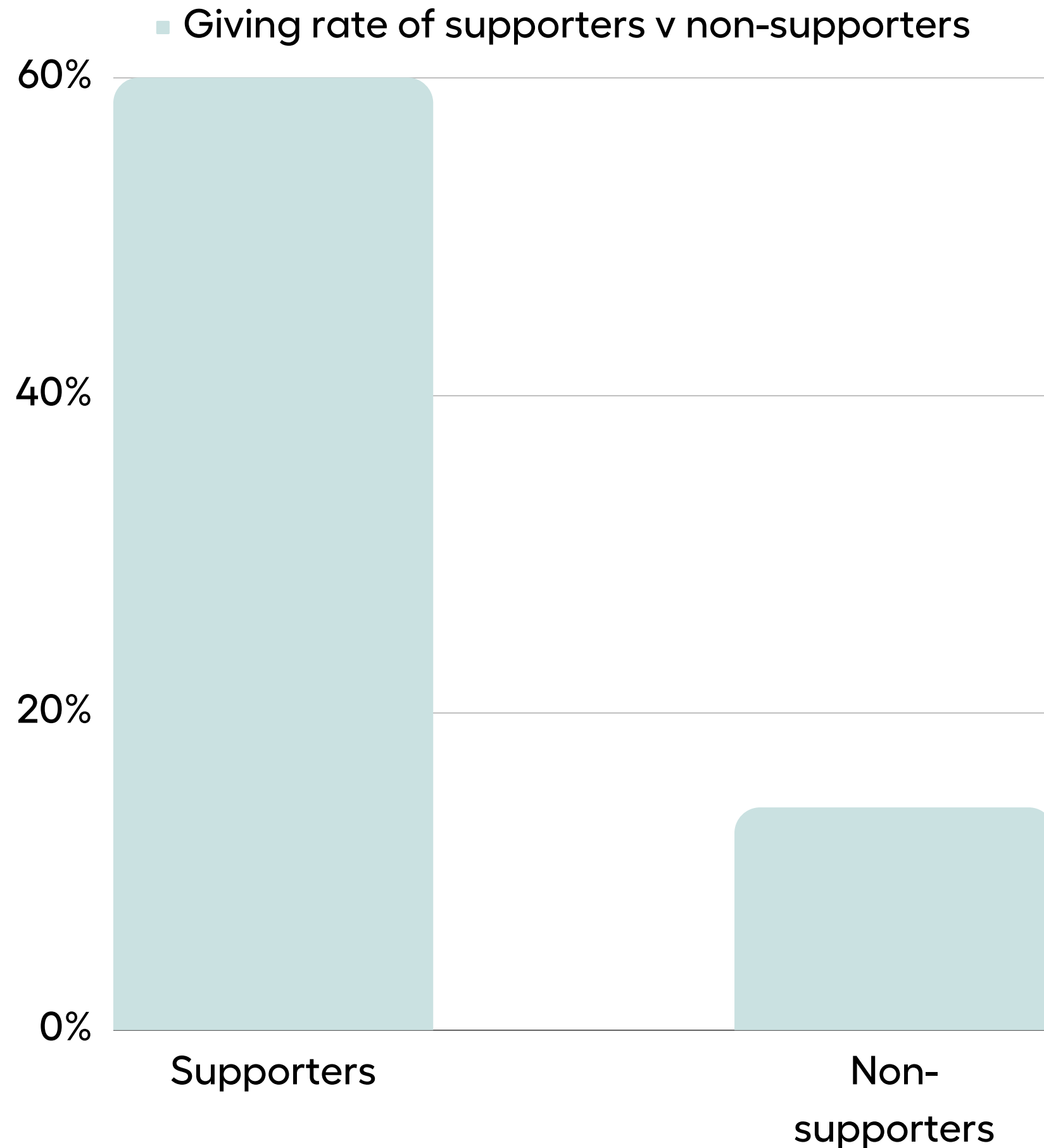
35% wills were  
written by married  
or de facto parents



The NFP space is driving  
positive change







## Charity campaigns are highly effective



Supporters are 4x more likely to pledge a gift



Biggest indicator of a person's likelihood to pledge a gift

## Include a Charity Week - Top Tips



success@gatheredhere.com.au

www.gatheredhere.com.au

gatheredhere

## Effective EDMs



success@gatheredhere.com.au

www.gatheredhere.com.au

### Posting on Socials

Social media plays an important part in encouraging gifts in wills among your existing supporter base. Here are a few examples to consider across Facebook and LinkedIn.

### Example 1



Profile Name (Name)

Ready to write your will?

We know lots of people try to get on top of their life admin in January, so we wanted to help.

We've partnered with Gathered Here, Australia's most trusted online will provider, to bring you a free online will, with free updates for life.

2023

gatheredhere



### New Year

## Gifts in Wills Campaign

### Subject lines

#### Tips

- Add personalisation** Use their name. Personalised subject lines typically increase open rates by more than 20%.
- Keep it short** Subject lines with 6-10 words have the highest open rates.
- Consider a question** Asking a question can force a reader to slow down, think, and consider your cause more carefully.
- Convey urgency** When possible, encourage people to act now (or quickly).
- Offer a gift or thank you** Frame the online will as a benefit to supporters.

#### Examples

<input type="checkbox"/>	<b>Inbox</b>	[Name], we have a New Year gift for you!
<input type="checkbox"/>	<b>Inbox</b>	Claim your free online will today!
<input type="checkbox"/>	<b>Inbox</b>	[Name], did you update your will last year?
<input type="checkbox"/>	<b>Inbox</b>	Do you have a will? Don't leave it too late.
<input type="checkbox"/>	<b>Inbox</b>	[Name], do you know what your legacy will be?
<input type="checkbox"/>	<b>Inbox</b>	Are you ready to create a life-changing legacy?
<input type="checkbox"/>	<b>Inbox</b>	Will 2023 be the year you create a life-changing legacy?
<input type="checkbox"/>	<b>Inbox</b>	Will you include a gift to [cause or charity] in your will?
<input type="checkbox"/>	<b>Inbox</b>	[Name], are you ready to write your will for free?
<input type="checkbox"/>	<b>Inbox</b>	Don't miss out - write your free online will today!



The New Year is a popular time to get finances in order

Many of your supporters will already be thinking about life admin, including writing or updating their will. Offering a free online will is helpful and timely.

Gathered Here typically sees an uptick in traffic during January

With more people visiting our online will platform, your charity is exposed to a wider audience. You can take full advantage of this through featured credits.



January tends to be a quieter period for charities and nonprofits

If this is the case for your organisation, there's less chance your bequest campaign will clash with another fundraising initiative.

Organising a New Year campaign can be quick and easy

We've put together a kit with everything you need to set up an effective gifts in wills campaign this January - including general tips, EDM copy, and advice on social posts.



### Email 1

To:

Subject: We have a New Year gift for you!

Hi [FIRST NAME],

Thank you for your support in 2022!

Your generosity helped us [KEY CHARITY ACHIEVEMENTS].

So, we wanted to give something back.

We know lots of our supporters use the New Year as a reason to revisit their finances and get on top of life admin. We can help.

We've partnered with Gathered Here, Australia's most trusted online will provider, to give our supporters access to a free online will, with unlimited updates for life.

Claim Your Free Will Today

Having an accurate and up-to-date will is one of the most important things you can do for your loved ones.

Not only will it reduce financial and emotional stress for them, but it also ensures your assets go where you want them to, so the people you love are well looked after.

### Our biggest tips

You've made it easy for your supporters to pledge a gift to your organisation in their will. Now, you just need to let them know about it. Adding information to your website is the first step.

To get the ball rolling, we've created some copy suggestions that you can tweak, change, mix and match however you see fit. We hope they help!

1

Remind visitors about your mission and what you've achieved

2

Educate supporters on the real-life impact of gifts in wills

# Templates can be used to maximise efficiency

## Can be tweaked to suit specifics

# Include a Charity Week was a big success

	Partner campaigns	Estimated gifts	Gifts received
Non-campaign period (July/Aug)	0	\$52m	448
★ IAC 2022	72	\$92m	930

**77%**  
increase

**108%**  
increase





# INTRODUCING...

## HEATHER BRUER

**Planned Giving Coordinator  
Climate Council**





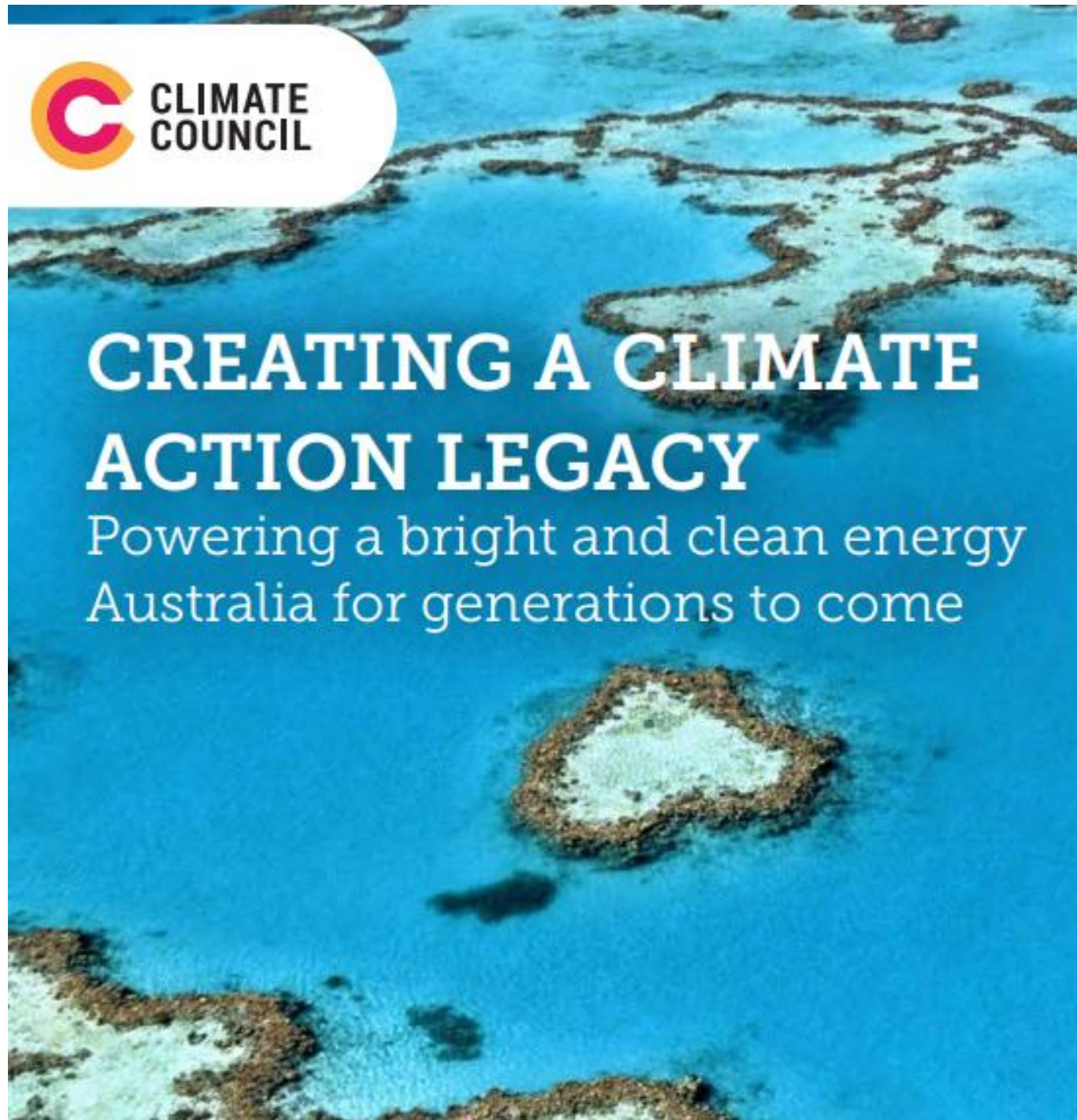


# CAMPAIGN CASE STUDY





# GIFTS IN WILLS



## Program Overview

- | Soft launched in 2019
- | Resourced at 0.6 FTE since Jan 2021
- | 79 Confirmed Gifts in Wills by Jan 2022



# INCLUDE A CHARITY WEEK 2022

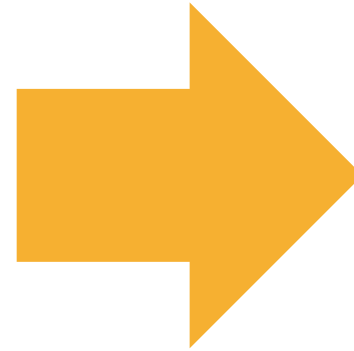
## Campaign Objectives

- 1 | Launch GiW program to supporter base
- 2 | Generate GiW leads
- 3 | Acquire new online donors





## WAVE 1



## WAVE 2

### Future Generations Pledge

**25 August**

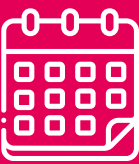
- EDMs
- Leads ads
- Website popups

### Include a Charity Week

**5-11 September**

- EDMs
- Social ads
- Email footer
- Personalised calls and emails to pledgers

# WAVE 1: FUTURE GENERATIONS PLEDGE



25 AUGUST

## Campaign landing page

### TAKE THE PLEDGE FOR FUTURE GENERATIONS

43 Shares

Share


Tweet

Share

Email


Share


Join Robin in creating a lasting legacy of a healthier, fairer and sustainable future for generations to come.

 Pledge a gift in your Will to future generations \ Climate Council

Watch later

Share



Watch on  YouTube

A gift in your Will can have a powerful impact on climate action and future generations.

It enables your voice, your legacy, to live on for many years to come, and can create a **better future for the people, places and communities you care about.**

After you have taken care of your family and loved ones, your far-sighted support will power the **smartest opportunities to make a difference on climate change** into the future.

#### Take the Pledge for Future Generations

I pledge to write or update my Will with a gift to the Climate Council in the next six months

First Name \*

First name

Last Name \*

Last name

Email Address \*

Email

Mobile

Date of birth:

DD/MM/YYYY

Please select one of the following options: \*

I intend to write a free, simple online Will

Please select...

I have a valid Will, I need to update it

I intend to write a solicitor Will

I intend to write a free, simple online Will

I already have a gift in my Will to the Climate Council

NEXT PAGE



# WAVE 1: FUTURE GENERATIONS PLEDGE



# 25 AUGUST

## EDMs

Hi Cameron,

I'm Robin, a scientist and Climate Council legacy donor.

As I write this, many communities are rebuilding for the second, third or even fourth time after the devastating recent floods. That's why I'm so relieved we finally have a federal government taking climate action. But we have a long way to go, and it will take all of us working together now and in the decades to come.

That's why I've left a gift in my Will to the Climate Council.

[Will you watch my video and join me in pledging to write or update your Will with a lasting gift to future generations today?](#)

**TAKE THE PLEDGE**

**A healthy environment is essential – we can't exist without it. That's why it's so important that we keep supporting climate action, now and into the future.**

**Dr Robin Gunning**  
Entomologist and Climate Council legacy donor

P.S. The Climate Council has partnered with Gathered Here, Australia's most-trusted online Will provider, to offer supporters a free simple, online Will with unlimited lifetime updates. [Get started writing your free online Will today.](#)

P.S.S. If you've already included a gift to the Climate Council in your Will, please let them know about your decision. This means they can thank you, and plan ahead to make an even bigger impact. You can reply to this email, call 02 9356 8531, or take the pledge notifying the Climate Council of your support. Thank you.

## Popups

**TAKE THE PLEDGE FOR FUTURE GENERATIONS**

Join scientist and Climate Council supporter Dr Robin Gunning in creating a legacy of a safer, healthier and brighter future for generations to come.

**Learn More**

## Lead Ads

theclimatecouncil • Follow

**Dr Robin Gunning**  
Entomologist & Climate Council Member

My first efforts were fairly, spectacularly unsuccessful.

**The Climate Council**  
Sponsored • Paid for by The Climate Council

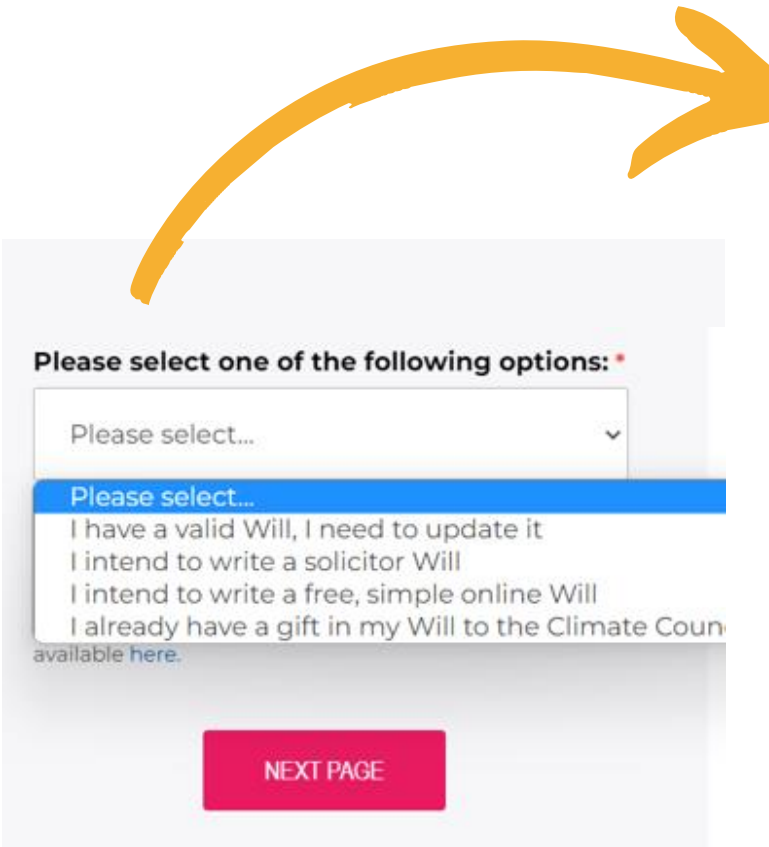
A gift in your Will will have a powerful impact on climate action and future generations. It enables your voice, your legacy, to live on for years to come, and will help secure a better future for the loved ones you leave behind.

Join Robin in pledging to write or update your will with a lasting gift of a safe climate.

CLIMATECOUNCIL.ORG.AU  
Take the Pledge to Future Generations  
The Climate Council is working to catalyse action on climate crisis across society, by pushing for...

**Sign Up**

# WAVE 1: FUTURE GENERATIONS PLEDGE RESULTS



Please select one of the following options: \*

Please select...

Please select...

- I have a valid Will, I need to update it
- I intend to write a solicitor Will
- I intend to write a free, simple online Will
- I already have a gift in my Will to the Climate Council available [here](#).

NEXT PAGE

\$Estimated future value:

\$351,000

Channel	Audeince Size	Clicks	Intending	Confirmed	Online Wills	Cost
EDMs	132,970	562	6	6 + 1 Reconfirmed	2	\$0
Lead Ads	22,116 (impressions)	324	1	0	0	\$1060
Popups	10,386	144	0	0	0	\$0



# WAVE 2: IAC week



# 5-11 SEPTEMBER

## EDMs

Hi Will,

Do you want to do something **big** to tackle climate change?

**This week, you can.** Today is the start of Include a Charity Week - a nation-wide social change campaign to raise awareness of legacy giving, or pledging a gift to charity in your Will.

You can make a lasting, significant difference on climate change with a gift in your Will to the Climate Council today. Learn how to [write or update your solicitor Will](#), or [write a simple online Will for free now](#) - it only takes 10 minutes!

**Write an online Will - it's free!**

Writing a Will is important at any age. A legally valid Will makes your intentions clear, and can help prevent extra stress, confusion and legal costs for your loved ones at an already difficult time. A simple Will can take less than 10 minutes to complete, but it could make a world of difference to the people you leave behind.

You also have the ability to include a gift to the causes you care about. Without legacy donations, charities like the Climate Council wouldn't be able to do vitally important work like pushing for urgent and sustained emissions reductions to protect entire ecosystems, lives and livelihoods.

Legacy donations our organisation has already received have empowered diverse voices to speak up about climate change in the media, and supported local communities to achieve their climate solutions goals.


So can you make a lasting gift of climate action in your Will today? Find out how to [write or update your solicitor Will](#) or get started [writing a free, simple online Will today](#).

## Socials Ads

 **The Climate Council with Gathered Here.**  
Paid Partnership · September 6, 2022 · 🌐

Join Robin leaving a lasting gift of a safe climate. Create a free, simple, legally-binding Will online today, with Gathered Here.

A gift in your Will will have a powerful impact on climate action and future generations. It enables your voice, your legacy, to live on for years to come, and will help secure a better future for the loved ones you leave behind.

 **Dr Robin Gunning**  
Entomologist & CI

GATHEREDHERE.COM.AU  
**Write an online Will - it's free!**  
The Climate Council is working to catalyse action on climate crisis across...

[Learn more](#)

+ personalised calls  
and emails to pledgers

## Email Footer

 **CLIMATE COUNCIL**

**CREATE A LEGACY OF CLIMATE ACTION**

**Create your free online Will today!**

# WAVE 2: IAC RESULTS

**Estimated future value:**

**\$771,946**

Channel	Audience Size	Clicks	Gifts from Online Wills	Cost
EDMs	133, 884	1,046	38	\$0
Social Ads	22,116 (impressions)	324	0	\$300
Gathered Here Featured List	-	-	5	Gifted by GH RRP \$149/gift

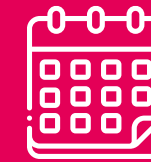
# WAVE 1 AND 2: Results by Segment

Of our 40 online GIW donors through both waves, 22 opted in

HERE'S WHERE THEY CAME FROM...

Segment	Size	Open rate	Clicks	Click rate	Completed opt in wills
Non Donors Unknown Age or Under 55	112,990	35%	733	0.7%	15
One Off Donors Unknown Age or Under 55	12,208	50%	167	1.1%	4
RGs & Mid value donors Unknown Age or Under 55	4,809	57%	100	2.1%	3
All supporters with Known Age 55 or Above	1,888	49%	20	1.1%	0
GIW pipeline	1,075	55%	26	1.1%	0

# TOP LEVEL RESULTS



## SEPT 2021 - JAN 2023

Channel	Duration	Total no primary gifts	Total future income
EDM series x 3 (IAC 2021 + IAC 2022 + Early 23)	4 weeks each	77	\$1,841,984
Paid Social (IAC 2021 + IAC 2022 )	3 weeks each	0	\$0
Featured listing via Gathered Here	12 days (Sept 2022)	5	\$31,842
Category listing via Gathered Here	1.4 years (Sept 2021 - present)	31	\$734,470
Climate Council Website (passive)	1.4 years (Sept 2021 - present)	1	\$34,169
Total primary gifts		113	\$2,643,465
Back up gifts		10	\$4,146,093
Total all gifts		123	\$6,789,558

Since Sept 2021

**123 GIFTS**

Total estimated future value

**\$6.8M**

Average Age

**52 YEARS**

Average residual

**\$30,915**

# KEY LEARNINGS and RECOMMENDATIONS

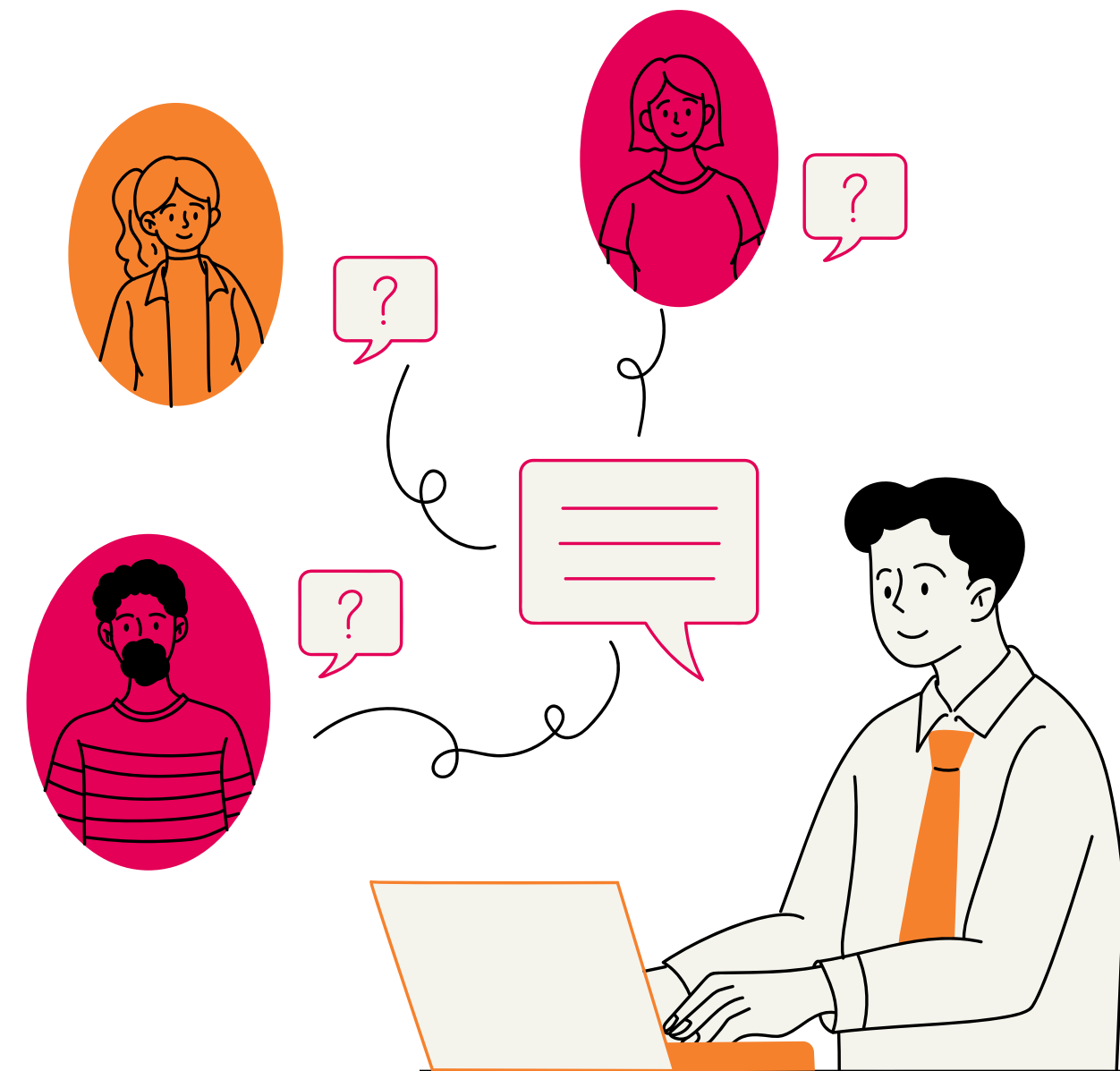
## (CLIMATE COUNCIL)

1 | It's time to run a digital GiW campaign

2 | Email is the most effective channel

3 | Steward your opt-ins

4 | Ask everyone





# KEY LEARNINGS and RECOMMENDATIONS

(CLIMATE COUNCIL)

5 | Use "simple wills" language

6 | Integrate traditional and online wills

7 | Measure and analyse results



# Recommendations

## EDM series (one per year)

- ✓ Dedicated and broad
- ✓ SMS / TM follow up
- ✓ Targeted messaging to key segments eg. lapsed donors
- ✓ Use the best-practice templates provided
- ✓ Continue to have digital prompts



# Recommendations

## New audiences



Google Ads



Corporate partners



Online will platform listings (set and forget)



Ambassadors/Influencers



Media/PR



# Learning

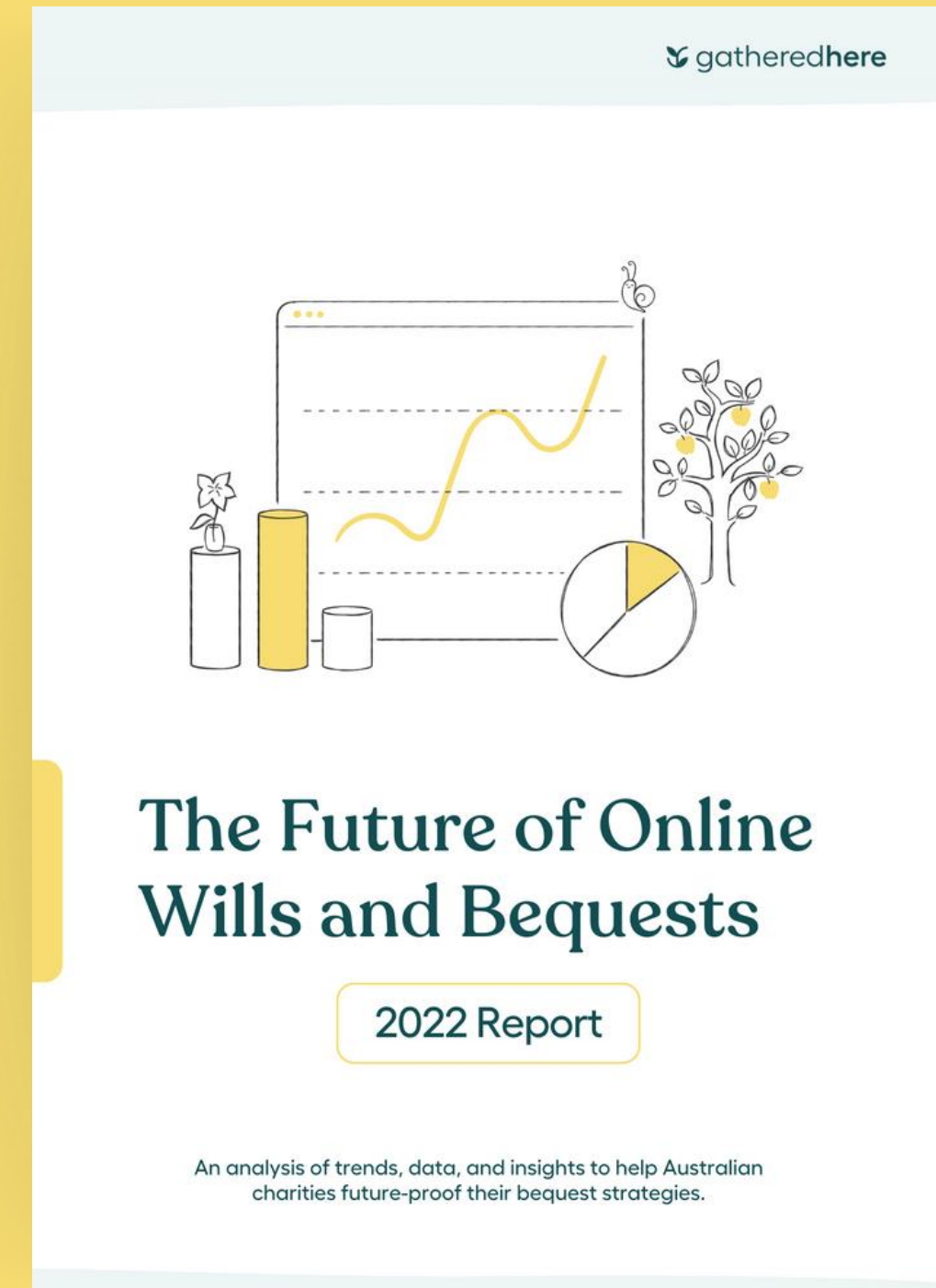
People are rapidly embracing online wills and legacy giving

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Download  
the report:

## Future of Online Wills and Bequests Report



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# Question Time







# Thank you

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