

Talking About Legacies to your Congregation

A Calendar of Ideas for
Clergy and Church Leaders



THE CHURCH
OF ENGLAND

Diocese of Leeds

Loving.

Living.

Learning.

Across the Church of England, gifts in wills are helping parishes to thrive. Legacies are a lifeline for our parishes. Each year around 4,500 people leave a gift in their will to a Church of England parish. In total, parishes receive around £60 million in legacy gifts each year – gifts to finance mission projects, maintain beautiful church buildings and grow faithful communities.

A gift in a Will of any size left to a local church is one of the most valuable and lasting ways people can continue to support mission and ministry within their community. Without your encouragement, many will never realise that their generosity can make a real difference, so we hope, with the help of this wonderful pack, you will be able to share confidently and faithfully with your church families how leaving a gift in their will can help the Church meet the needs of future generations.

*Helen Simpkins & Eleanor Stead
National Giving Team Legacy Advisors*

Today's Christians (and indeed non-Christians), churches and local communities all benefit from the generous giving of those who went before us. Sacred buildings, works of art, trained clergy, provision for the poor and needy and masses of Bible translations.

Today we are encouraged to leave a legacy for those who will follow us. Those who came before us gave because those who came before them gave to them. This whole ongoing road to generous giving stretches right back to God himself who gave us the great legacy of Jesus and his sacrificial love and life.

So I commend this very helpful booklet to your generous hearts and open pockets. Leaving a legacy, whether big or small is something we can all do, and do with great joy.

*Revd. Canon Robin Gamble
Bishop's Adviser for Church Growth
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Introduction

Leeds legacy picture

In 2017 legacies formed 6% of income to parishes in the Leeds Diocese which is less than the church average of 7% and significantly less than the entire charity sector average of 14% of total income. New figures for 2018 reveal that this has decreased to 5.5%.

Findings of the Church of England legacy studies

In 2019 Church of England conducted a National Analysis of Legacy Data and looked at how the Church were performing in the charity sector with regards to legacies.

- There is a picture of growth in legacies in the Church but it is not happening as quickly as for the rest of the charity market
- Legacies can offer real-term growth for parishes, but only if greater levels of resource and investment is provided to maximise their promotion and adoption

Why should every Christian have a will?

We see ourselves as God's stewards, entrusted to use His gifts to us, for the good of our family and our Church family.

In thanksgiving, we should also take Will writing seriously – setting our affairs in order and stewarding them wisely to the end of our time on earth and beyond.

Messaging

The best messages to communicate about legacies are those that promote the vision of your church and the part it plays in your legators' lives. People don't really want to leave a legacy to fund maintenance projects although it's true that maintenance often leads to bigger things in your church. They would rather feel they are contributing to the life and work of the church, in other words, the mission and ministry, so 'visionary' language is crucial and this document gives ideas.

More importantly, conversations about death and dying are very challenging for people to think about. No one likes to think about how or when they will die as it creates huge anxiety. If we can think things through beforehand, it can make things easier when those moments come and this is something to emphasise when you talk to people or write communications on pew sheets or websites.

The purpose of this legacy pack

Legacy communication is often seen as being onerous and most of all, difficult for our Clergy to approach with their congregations. There is the fear about talking about death and awkwardness in asking for the pledging of legacy gifts. What fails to be acknowledged is the joy and the promise that making a bequest brings for the donor. This may be the only donation that they will ever make of hundreds, perhaps thousands of pounds and their gratification in knowing that their gift will truly make a difference should not be underestimated.

Gifts in wills should be encouraged, but in a sensitive, low-key manner, drip feeding messages in different ways throughout the year. This ensures that legacies are seen as a normal way of supporting your church and not something strange that is rarely ever talked about!

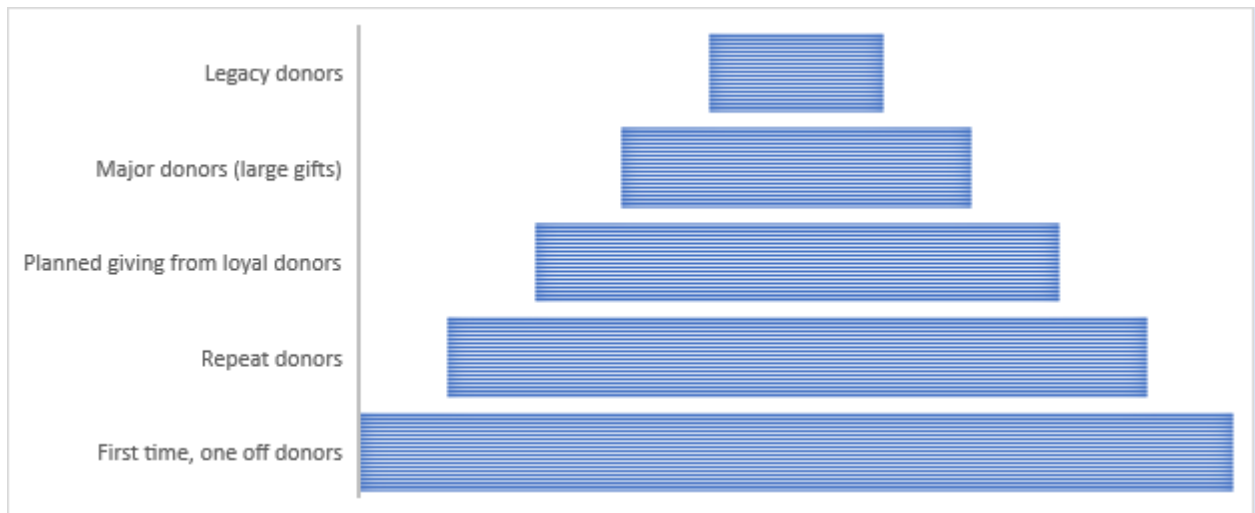
This pack is intended to help parishes to understand legacy fundraising in the church and give useable examples of how to promote legacies to congregations sensitively, legally and ethically throughout the year. There's no need to do everything suggested here you can pick and choose the ideas that appeal to you and your congregations. One thing to note is that some activities such as FreeWill and Will Aid are limited to a particular month. It's also nice to run a legacy event in the summer and use August (as it's quiet) to take stock.

January

According to data collected by the Church of England, there is a strong relationship between the overall decrease in planned givers (presumably who have died) and legacy income. For every deceased planned giver an average £835 of legacy income is received. This suggests that planned givers are an important audience for legacy marketing.

We can start by saying **THANK YOU**

To understand why we need to say thank you and look after the Church's planned givers, it is helpful to look at the Donor Pyramid.



When we look at the people who donate to our church, there are more at the bottom category than at the top. How do we try to encourage people to become more generous and move up the pyramid? The answer is *we look after them!*

Saying thank you is crucially important to ensure that every donor is certain that their gift is appreciated and going to a good cause. Get creative and pen a thank you letter or a card that really expresses the importance of gifts to your church in the previous year and speak about the impact it has had for all:

Thank you!!

I am writing to all of our regular givers to say Thank you! Your generous giving is a vital enabler of our work together as a church.

Last year we were able to:

- ♦ *start a new youth club, with set up costs of over £1500.*
- ♦ *pay our Parish Share in full, contributing our share of the costs of ministry to every person living in this area.*
- ♦ *upgrade the kitchen in the church hall and repair the church heating system. This ensures that we keep our building in good shape.*
- ♦ *give away over £1000 to support our two chosen mission agencies and charities; Malawi schools and Christian Aid.*

All of this takes time and money, and it wouldn't have been possible without the generous contribution of our regular givers – your kindness is making a real difference!

Use words like *generous* and *kindness* to make your donor feel extra special!

February

Church of England legacy tools

February is a good time to get to grips with what the Church of England provides to help you with legacies. Get familiar with <https://www.churchlegacy.org.uk/> and order the PCC Legacy Toolkit either on the website or by contacting the Stewardship and Income Generation Team.

Use the Pack and:

- Check your legacy policy using the sample wording provided in the pack
- Pin up the legacy poster on your notice-board

Use the website to:

- Download and print the booklet 'Gifts of Faith, Hope and Love' and display it in your church
- Order more copies of the legacy bookmark and leaflet 'How you can make a lasting gift to your church' from Church Legacy to give to every planned giver in your church



DID YOU KNOW?

People leave gifts to their church because they trust their money will be used wisely and used to create a lasting legacy.
Publicise your Legacy Policy to show your congregation how you will use legacy gifts.

March

March Is FREE WILLS MONTH!

Free Wills Month brings together a group of well-respected charities to offer members of the public aged 55 and over the opportunity to have their simple wills written or updated free of charge.

An up-to-date will is written by a solicitor and ensures your wishes are respected. It also avoids difficult decisions and legal complications for your loved ones. Free Wills Month allows you to write a will that provides for family and friends and a gift to your chosen charities too.

On the [free wills website](#) you are able to search for a solicitor in your local area, make an appointment during March and have a simple will written for free. Even though the event is sponsored by a group of large national charities, you are able to leave a gift in your will to a charity of your choice at the same time.

In your church, publicise the event to your congregation on your social media and pew sheets, some sample wording is shown below:

We are privileged if we can leave a mark of our passing, to be remembered by those people and causes we've cared for in life. A gift in your will to your church is one of the most valuable and lasting ways you can continue to support its mission and ministry. Making a will can typically cost over £150, however, March is "Free Wills Month" where you have the opportunity to make your will for free and support your favourite charities by making a gift.

We pray that as you plan to distribute your estate, you will feel encouraged to remember your church family and we invite you to consider how a gift in your will could help the Church meet the needs of future generations.

Go to <https://freewillsmoath.org.uk/> to book an appointment to make your free will in March.



DID YOU KNOW?

People are put off making a will because they feel the process is too complex. Make things easy for them by showing them the Free Wills website where they can download a will planner and find a solicitor to write their will for NO COST!

April

A parish legacy impact story

When the Church of St Margaret's in Horsforth were left a legacy gift from a dear departed member of their congregation who was a former midwife, they could think of no better use for it than a font project.

Freda Plews' gift enabled the Church to replace their font with one relocated from the closed church of St Barnabas in Hightown. At the same time, they took the opportunity to move the location to make room for a kitchenette at the back of the church.

The team at St Margaret's were able to find a second use for their old font in the church garden as a planter full of beautiful new plants.

To celebrate the work, Revd. Nigel Sinclair arranged a baptism celebration, showcasing vintage baptism clothes and registers for visitors to view and a special Sunday service for everyone, particularly those who had been baptised in the 'old' font.

Sharing legacy stories like this one with the congregation not only celebrates the life of a loved one, it also gives people confidence that the gift will be spent well. Giving people confidence that precious legacy gifts will *make a difference* and be *spent wisely* is crucially important if you are hoping to grow the numbers of legacies received.



Talk about a recent legacy received in services and give thanks to God for the donor's life and kindness

Put the money to good use (according to your PCC legacy policy) and celebrate the completion of the works with an event

Use phrases such as 'thanks to Mr Jones' generosity/kindness/benevolence/thoughtfulness in life we are able to make a fitting and lasting tribute to him in our church by...' in your literature

And finally, don't forget to ask people to consider leaving a lasting gift in their will and how show them how they can do it

DID YOU KNOW?

One of the reasons that people leave legacy gifts is to 'live on' and to be remembered after their deaths. Imagine how Freda's close friends felt, seeing her life celebrated and 'lived on' in this special way.

May

Find a living legacy ambassador!

By this time in the year, and assuming all your legacy messages have been heard loud and clear, you may have encountered a congregation member or two who have indicated that the church is to be a beneficiary in their will. If this is the case REJOICE! You have earned their trust and confidence and inspired them to give you a legacy gift.

Living legacy donors are like legacy gold for they can be the ambassadors for legacy giving. Have you seen the advertisements on the television that show people saying why they have chosen to leave a gift to a charity?

"The only thing you take with you when you're gone is what you leave behind so I have chosen to leave a gift in my will to the children's hospital because I know it will make a difference to the lives of the young."

Charities use the fact that people ask themselves "what are people like me doing?" to appeal to new legacy donors. If your congregation see that someone is leaving a gift to the church, the hope is, they will do the same.

If there is someone in your church who would be willing to talk about what the church means to them and why they have chosen to leave a gift in their will then use it! Print it on your pew sheets or publish it on the website. If you can't find a living Legacy donor then try making a display of the Church Legacy material with some 'quotes':

Can you leave a legacy to our Church in your will?

"The Church has been here for me when I have needed it and I want it to be here for my children when I have gone"

"My church has taught me to be a true follower of Christ and live life according to God's will"

No matter how large or small, every gift in every will makes a difference"

A Lasting Gift to your Church

For further information visit www.churchlegacy.org.uk
You can also discuss gifts in wills in confidence with the Treasurer or incumbent.

THE CHURCH OF ENGLAND
www.churchlegacy.org.uk

"I love being a member of my Church. It gives me a true sense of belonging and kinship with fellow Christians"

"The beauty of this historic place is beyond measure. It needs preserving for future generations"

June

An 'Always On' approach

For several years, charities have been investing in online legacy promotion, and it seems to be paying off. The Salvation Army reported that 27.5% of all income in 2019 came from legacies and in the same year, Christian Aid received £12 million from legacies, representing a huge 22% of total income. Compare that to the Church of England's 7% and you can see there's some catching up to do!

These charities have adopted an 'always on' approach to legacy information, in other words, whenever a donor thinks about leaving a gift in their will to the Salvation Army or Christian Aid they can always access information online. Take a moment to look at their websites:

<https://www.salvationarmy.org.uk/giftsinwills>

<https://www.christianaid.org.uk/give/gifts-in-wills>

If you have a website you might consider dedicating a whole section to legacies (or at the very least, point people to churchlegacy.org.uk). Key information to include is:

- Why legacies are important and what a legacy would mean to your church
- The PCC legacy policy
- Stories about previous legacies or a living legacy account
- How to leave a gift in a will

This is the bare minimum, but you can see how much effort the major charities put into their legacy pages and you might wish to really make a feature on your website. Note the tone of the messages from The Salvation Army and Christian Aid and use similar sensitive, gentle and reassuring wording.

"Leaving a gift in your Will may be an act of faith – a way to acknowledge the blessings you've received during your life. Or ensuring your values of compassion and justice live on after you've gone" Christian Aid

"By leaving a gift in your will to, your compassion and kindness will live on. It will stretch further and reach more people - you'll help our officers, staff and volunteers give thousands the support they're crying out for" The Salvation Army

"Once you have made provision for your loved ones, you have the opportunity to make a lasting gift to God, by leaving a legacy to His church. A gift in your Will to your local church is one of the most valuable and lasting ways you can continue to support its mission and ministry within your community. A gift can be an expression of your gratitude and thanksgiving towards God, and can help keep your local church alive, and help transform its future" Church Legacy

DID YOU KNOW?

Baby boomers spend 27 hours per week online, which is two hours more per week than those who are between 16 and 34. (Source [Colorado University](http://colorado.university)) Therefore creating an online legacy page has to be worth the effort and time.

July

A legacy event

July, the season of outdoor events, is a great time to hold a legacy get-together. Many different variations of event are possible and it all depends on what your congregation like to do. Could you have a bring and share supper, an afternoon tea, strawberries and cream event, Sunday brunch, a picnic, a cheese and wine party? The idea is to bring people together so you can talk to them. You will also be aware of the best time of day for all.

A typical programme of the event may look something like this:

Time	Activity	Person	Notes
6:00	Arrival		Drinks and food served
6:30	Welcome, Prayer, Introductions	Incumbent/church representative	Introduce leaflets
	CofE Legacy Video		
	Our Church and Legacies		
	Legacies and the Christian Giver		
6:50	Interview with a Legacy Giver	Legacy Giver	
7:00	Importance of making a Will	Solicitor	
7:20	Break		Recharge glasses
7:30	Preparing for your Funeral	Funeral Director	
	Arranging a Loved One's Funeral		
7:40	Q&A		
8:00	Final Comments, Closing Prayer, Depart	Incumbent	

When you send invitations, make it clear that people will not be asked to leave a legacy or make a donation on the day. The event is simply to find out more about this form of giving and have an enjoyable time at your Church or Cathedral

Incumbent/Church Representative

It's good to have someone who is confident talking about this area of giving, to combat any concerns about it 'not being appropriate'. This person can help to ease the atmosphere and give people a sense of 'it's ok to talk about this'.

- Reflect on your vision and mission
- The importance of Christian Giving and why every Christian should have a will. Leaving a legacy might not be for everyone, but for some is an appealing way to give
- In talking about legacies you must also talk about death, and the importance of life, death and resurrection
- Remind people of the current funding priorities
- Explain why legacies are important
- Share how legacies have been used in the past and the impact they've had
- Explain how future legacies could make a difference and how they can be left
- Introduce relevant literature and information available
- Highlight the opportunity to speak to representatives after the talk

Will Writing Professional

- What is a will and why you need one
- How much one costs
- Explain (briefly) inheritance tax
- What a legacy is and the types of legacy gifts that can be left
- Highlight the opportunity to speak privately after the event

Legacy Ambassador

- Introduce themselves and their connection to the church
- Why they've left a legacy
- Why the Church/Cathedral is important to them
- What difference they hope it will make
- **NB This will be the most powerful and persuasive part of the event**

August

Legacy facts

August is usually quiet in the church with so many people away enjoying their holiday, so it's a chance to understand some facts...

Definitions:

Legacy: A gift by will, usually money, left to a person or organisation

Residuary: A gift of the remainder of the estate after all other payments have been made

Pecuniary: A gift of a fixed sum of money

Restricted: The legacy is to be spent on a particular purpose or project

Unrestricted: There are no limitations on how the legacy is to be spent

An Ethical Approach:

In legacy fundraising, it is essential to be aware of the incredibly sensitive issues involved: often large amounts of money in wills, bereaved families, potentially vulnerable audiences and the connection with death.

In line with the Institute of Legacy Management's ethical framework, the Church of England is committed to fulfilling donors' final wishes with sensitivity, transparency, integrity, collaboration and keeping loved ones informed.

Who makes a will?

The answer is any adult – irrespective of age. Studies show that people make wills at three major life events – changes to family, changes to wealth and changes to health so don't limit your legacy communications to the older members of your congregation.

If you are blessed enough to receive a gift in someone's will, the chances are, you may never know until after they have died. That is why it is crucially important to look after all your church community. Reward every donor of time, talents and money with gratitude, and prayers whilst they are still with you. As a bare minimum, write letters or cards of thanks at least every year.

Why do people *not* make a will?

The number one reason people cite for not making a will is that they haven't got around to it.

This is where you can make it fabulously easy! Highlight the March Free Will event and the September Will Aid event. Also, publicise the Church of England's support

<https://www.churchlegacy.org.uk/writing-your-will/writing-your-will>



September

Book your appointments for Will Aid month

Will Aid month is not actually until November but you have to get organised in September and book November appointment NOW because slots go really quickly.

What is it?

Will Aid is a special partnership between the legal profession and nine of the UK's best-loved charities. Every November, participating solicitors waive their fee for writing a basic Will. Instead, they invite clients to make a voluntary donation to Will Aid – a suggested £100 for a single basic Will and £180 for a pair of basic 'mirror' Wills.

With Will Aid, everyone benefits. You get a professionally drawn-up Will and peace of mind, while the charities receive much-needed donations for their vital work.

Of course, people are also able to leave a gift to their church in the wording of their will so this would be a good time to make them aware of the wording:

To leave a share of your estate:

"I give _____ % of my residuary estate free of all taxes to the Parochial Church Council of the parish of _____
(registered charity number if applicable) _____ in the
Diocese of _____ for its general purposes, and I declare that
the receipt of an officer of the Parochial Church Council shall be a sufficient discharge
to my executors and trustees."

Go to:

<https://www.willaid.org.uk>

To leave a fixed sum of money:

"I give the sum of £ _____ (_____ pounds only) free of all taxes to the
Parochial Church Council of the parish of _____
(registered charity number if applicable) _____ in the
Diocese of _____ for its general purposes, and I declare that
the receipt of an officer of the Parochial Church Council shall be a sufficient discharge to
my executors and trustees."

Plenty of people in your church may have already written their will and to save the trouble and expense of re-writing, they can add a codicil. A codicil is a legal document which allows amendments to an existing Will. Codicils, if filled out correctly, should not need the advice of a solicitor, but it's always best to check if you have any doubts.

Sample codicil wording is shown below:

Codicil

I, _____ (name) of
_____ (address)

declare this to be the _____ (1st/2nd/3rd etc) Codicil to my Will dated
_____ (date). I give: _____ % of my residuary estate

OR a gift of £ _____ (_____)

[choose one of these options and delete the other. If choosing the latter option,
insert amount in numbers then, in the brackets, in words] free of all taxes to the
Parochial Church Council of the parish of _____ in
the diocese of _____ for its general purposes
and I declare that the receipt of an officer of the Parochial Church Council shall be a
sufficient discharge to my executors and trustees. In all other respects I confirm my
Will and any previous codicils thereto. In witness whereof I have hereunto set my
hand on this the

_____ (date)

Signature _____ (your signature)

This codicil was signed by the above named person in our joint presence, and then
by us in his/hers.

Signature _____ (witness signature 1)

Name _____

Address _____

Signature _____ (witness signature 2)

Name _____

Address _____

October

A memorial service

Plan a special memorial service to celebrate the lives of loved ones and invite the whole community to come along.

Consider if these events need to be both inclusive and accessible, regardless of the nature and extent of belief. Should they be traditional, or creative, or a blend of both?

Welcome

Hymn: *Abide with me*

Poem: *'Sometimes I need strength'* (Tom Gordon)

Hymn: *Be still, for the presence of the Lord*

Poem: *'Sorting through'* (Liz Lohead)

Act of Remembrance (e.g. lighting a candle, reading the names of the deceased or hanging a message on a tree)

Quiet moment with music

Thanksgiving and the Lord's Prayer

Bible Reading: 1 Corinthians 15:35, 37-38, 42-44

Reflection

Hymn: *Be thou my vision*

Poem: *'If I should go before the rest of you'* (Joyce Grenfell)



Detailed guidance and resources are given on the excellent website from the Association of Hospice and Palliative Care Chaplains [here](#).

Whilst not the primary focus of the gathering, it is appropriate to ask for donations for the church in a sensitive manner.

"Your presence here this evening is a blessing and our entire church community thank you. As you leave, please would you consider leaving a gift to enable us to continue our work of supporting the bereaved thorough the funeral process and as they come to terms with their loss. Please know, that we are also here to pray and support you as you remember your own relatives and friends"

Remember that lots of people don't carry cash so having a contactless payment solution would really help at events like this.

You might also send each of your congregation away with a personal card or candle or some other token from the church. They could find it a comforting gesture and a reminder of a very special occasion.

November

Take a look at 'Gravetalk'

For those with big questions about death, dying and funerals, having someone to talk to can be invaluable. But how do you start those conversations, and with whom? There are a growing number of café spaces which bring people together to do just that – this page tells you more about GraveTalk, launched through the Church of England.

The Church of England has been helping people think about these questions for centuries. GraveTalk is a café space, organised by a local church, where people can talk about these big questions. The conversation is helped along by GraveTalk conversation cards – 52 questions covering 5 key areas.

Events have been held in locations across the country, and people of all ages have gathered to talk and share their thoughts about death, dying and funerals. GraveTalk is a café – so there is always tea and cake.

A GraveTalk Event can take place in a church hall, community centre or even a High Street café. People arriving will be welcomed by the person running the event – it may be the vicar or someone else from the church – and then invited to sit at tables with three or four others. The GraveTalk cards will be on the tables, and each group picks a question and uses it to start a conversation. It doesn't matter if you only use one question – or work through all of them! The purpose is to talk and listen.



Light refreshments are offered throughout the event, which lasts about an hour, or longer if needed.

This is not strictly a legacy event, although it wouldn't hurt to subtly leave a few legacy leaflets out or have a legacy display. Rather, it's an opportunity for people to explore what can be uncomfortable issues surrounding death and dying and conversations that you may have in the future with your congregation about legacies, do not seem so strange!

The GraveTalk website says more: <https://churchofenglandfunerals.org/gravetalk/>

Life: *What is important in your life? How would you like to be remembered?*

Death: *What experiences of death have you had so far? What do you think death means?*

Society: *How has our culture shaped our thinking about death?*

Funerals: *What will happen when you die? Do you need to make any plans or choices now?*

Grief: *What is the reality of loss and how do you experience it?*

December

Giving in memory

December is the month to explore how your church receives financial gifts given by the living relatives and friends of someone who has died.

Giving in Memory is a unique way for people to honour the memory of a loved one and to keep the memory of them alive, it is also thought to be a way of helping the grief process. Churches often host a prayer space where people are encouraged to kneel or sit in prayer and light a candle for a small donation and these are often places where people remember their loved ones, but there are other ways you can receive donations. Some churches have a tree onto which ribbons or leaves are placed with the name of the loved one, others have a memory book where precious memories can be shared. Some receive in memory gifts to purchase flowers or new hymnals and bibles and have explored online tribute pages to write fond memories of loved ones lost.



Giving in memory is

- A way of keeping a link with the loved one and part of the grief healing process
- A way of repaying an organisation for the role they played in someone's life
- Giving thanks for a loved-one's life
- A way to create a lasting memorial

Giving in memory is important to different people for different reasons. *Is your church enabling or denying people the opportunity to give these gifts?*

DID YOU KNOW?

People who have previously given in-memory are three times more likely to include the same charity in their wills, compared to regular donors who give via direct debit or standing order.

Helpful websites and resources

ChurchLegacy.org.uk for all information relating to gifts in wills for the Church of England

FreeWillsMonth.org.uk A campaign offering free wills to the over 55s in March

WillAid.org.uk A campaign offering free wills in November

Churchofengland.org/life-events/funerals All information about a Church of England funeral

Churchofengland.org/life-events/funerals-new/after-funeral/what-gravetalk Information about Gravetalk – a café space to talk about dying and death

www.ahpcc.org.uk The Association of Hospice and Palliative Care Chaplains to find information about running an in-memory event

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