



Gifts in Wills Accelerator Kit

Campaign & Promotion Resources

Practical tools, content recommendations and ready-to-use templates to help you keep Gifts in Wills visible throughout the year.



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Welcome

Consistent visibility is an important part of building a strong Gifts in Wills program.

These Campaign & Promotion Resources have been designed to help you keep Gifts in Wills visible throughout the year without needing to create new content from scratch.

The suggested annual calendar provides a simple, light-touch 12-month communication plan, designed to help you introduce Gifts in Wills gradually and build familiarity over time. Through regular but gentle touchpoints, supporters can become more familiar and comfortable with the idea of legacy giving, without feeling overwhelmed or repeatedly asked.

The quarterly activities move from awareness to understanding, connection and inspiration, supported by ready-to-adapt newsletter content, organic social posts and annual staff and supporter communications.

The activities are designed to fit naturally alongside your existing communications and key fundraising activity, such as appeals, campaigns and supporter updates, rather than compete with them. Simply adapt the templates to reflect your organisation's voice, mission and audience, then incorporate them into your existing communications calendar.

The templates are intended as a starting point and can be adapted over time as your program grows.

Remember, the goal isn't to ask supporters to leave a Gift in their Will every quarter. It's to create regular opportunities for people to learn, connect and take the next step when the time is right.

Using this resource

Use the 12-Month Promotional Calendar to plan your Gifts in Wills activity across the year.

For each communication:

- ☐ Adapt the content to your organisation's voice and audience.
- ☐ Replace all {{placeholder text}} with your organisation's details.
- ☐ Link to your Gifts in Wills webpage or relevant next step.
- ☐ Select imagery that reflects your organisation and impact.
- ☐ Brief your Gifts in Wills contact before communications are sent.
- ☐ Record and respond to any enquiries generated.

Your 12-Month Promotional Calendar

A simple annual rhythm can help keep Gifts in Wills visible without overwhelming your supporters or communications calendar.

The suggested activity below is designed to complement your existing supporter communications and can be adapted to suit your organisation's priorities, capacity and key dates.



Quarter 1: Gifts in Wills Awareness & Free Online Wills



Increase awareness of Gifts in Wills and make it easy for supporters to take a practical next step.

Purpose

- ✓ Increase awareness of your Gifts in Wills program.
- ✓ Provide a useful service to supporters.
- ✓ Promote your free online Will offer.
- ✓ Make it easy for supporters to learn more.
- ✓ Create opportunities for future Gifts in Wills conversations.

When to use

Use this content early in the year to introduce or refresh awareness of your Gifts in Wills program and promote your free online Will offer.

Recommended content

- ☐ Why having an up-to-date Will matters.
- ☐ Details of your free online Will offer.
- ☐ The option to make or update a Will with a solicitor.
- ☐ A gentle introduction to Gifts in Wills.
- ☐ A clear link to learn more.

Suggested call to action

Primary: {{Make or update your Will}}

Secondary: {{Learn more about Gifts in Wills}}

Included templates

1. Annual staff email communication.
2. Dedicated supporter email communication.
3. Organic social media post.

Before you hit send..

- ☐ Check your online Will link is current.
- ☐ Check your Gifts in Wills webpage is up to date.
- ☐ Brief your Gifts in Wills contact.
- ☐ Schedule your newsletter and social content.
- ☐ Record and respond to any enquiries.

Quarter 1: Email Template (Staff)

To: {{All Staff / Relevant Team}}

Subject: {{PLACEHOLDER: Recommended subject line}}

Email content

Hi team,

We're passionate about the impact we make today – and about ensuring we can continue this impact for years to come.

Gifts in Wills are an important part of our future. They help ensure that people who believe in our mission can continue supporting our work beyond their lifetime.

We want to make sure everyone at {{Organisation}} understands how our Gifts in Wills program works and how you can help.

Here's what you need to know:

- Supporters can choose to include a Gift in their Will to {{Organisation}}.
- We offer a free online Will service to help supporters make or update their Will.
- Supporters can also speak with a solicitor about including a Gift in their Will.
- If a supporter mentions a Gift in their Will, you don't need to be an expert.
- Please let them know our Gifts in Wills contact is here to help.

If you have any questions or would like more information, please reach out to {{Gifts in Wills Contact}}.

Thank you for helping us create a lasting impact for future generations.

Kind regards,

{{Name}}
{{Position}}
{{Organisation}}



EXAMPLE PREVIEW

Full ready-to-adapt communication included with the **Gifts in Wills Accelerator Kit**

Useful links



Staff Toolkit

{{PLACEHOLDER: Link to Staff Toolkit}}



Gifts in Wills webpage

{{PLACEHOLDER: Link to Gifts in Wills webpage}}



Free online Will service

{{PLACEHOLDER: Link to online Will service}}

Quarter 1: Supporter Email Communication Template

To: {{Supporter Audience}}

Subject: {{PLACEHOLDER: Recommended subject line}}

Email content

Hi {{First Name}},

You were also offered Gifts in Wills 2020 to support the children's welfare across Wills when they pass on. It's time to make sure you're ready for the future.

You can update your Will for free online.

Make or update your Will for free online

This service is available to all our supporters and the more, the better. Gifts in Wills is a free online service that allows you to make or update your Will for free.

You can also speak with a solicitor

If you're unsure how to make your Will, Gifts in Wills can help you. You can speak with a solicitor for more advice and support. Gifts in Wills is a free online service.

A lasting difference

- Share the stories of how the people who have helped you have made a difference.
- They will be able to see the difference you have made.
- They will be able to see the difference you have made.
- They will be able to see the difference you have made.

Make or update your Will for free
Takes around 20 minutes

Learn more about Gifts in Wills
See how your future gift can make a difference

Thank you for being part of our community and for supporting our work today and into the future.

Warm regards,

{{Name}}
{{Position}}
{{Organisation}}



EXAMPLE PREVIEW

Full ready-to-adapt communication included with the Gifts in Wills Accelerator Kit

CALL TO ACTIONS

Primary CTA

{{PLACEHOLDER: Recommended primary CTA}}

Secondary CTA

{{PLACEHOLDER: Recommended secondary CTA}}

WHAT TO INCLUDE



Why it matters

The importance of having an up-to-date Will and the peace of mind it brings.



Free online Will offer

Details of your free online Will service and how easy it is to use.



Solicitor option

The option to make or update a Will with a solicitor.



Gifts in Wills

A gentle introduction to Gifts in Wills and the impact they can create.



Clear next steps

Make it easy for supporters to take the next step.

REMINDER CHECKLIST



Check online Will link is current.



Check Gifts in Wills webpage is up to date.



Confirm contact details are correct.



Brief your Gifts in Wills contact.



Prepare to respond to enquiries.



IMPORTANT

Supporters should never be required or pressured to include a charitable gift in order to access a free online Will offer.



QUICK TIP

Keep your message simple, focus on the benefit and always include a clear next step. Consistency is key to keeping Gifts in Wills top of mind.

Quarter 2: Gifts in Wills Education & Myth-Busting



QUARTER 2:
EDUCATION & MYTH-
BUSTING

Build understanding and confidence by answering common questions and addressing misconceptions about Gifts in Wills.

Purpose

- ✓ Make Gifts in Wills feel more accessible.
- ✓ Build supporter understanding and confidence.
- ✓ Answer common questions about Gifts in Wills.
- ✓ Address misconceptions that may prevent people from considering a future gift.
- ✓ Make it easy for supporters to learn more.

When to use

Use this content to provide practical information, answer common questions and address misconceptions about leaving a Gift in a Will.

Recommended content

- ✓ You don't need to be wealthy to leave a Gift in your Will.
- ✓ Family and loved ones can come first.
- ✓ Gifts of all sizes can make a meaningful difference.
- ✓ There are different ways to include a Gift in your Will.
- ✓ A clear link to learn more.

Suggested call to action

Primary: {{Learn more about Gifts in Wills}}

Secondary: {{Read our Gifts in Wills Guide}}

Included templates

1. Newsletter article
2. Organic social media post

Before you hit send..

- ☐ Check all information is accurate and up to date.
- ☐ Keep the language simple and accessible.
- ☐ Avoid providing legal advice.
- ☐ Check your Gifts in Wills webpage is up to date.
- ☐ Schedule your newsletter and social content.
- ☐ Record and respond to any enquiries.

Quarter 2: Newsletter Template

Suggested headline

{{PLACEHOLDER: Recommended Q1 newsletter headline}}

Suggested introduction

{{PLACEHOLDER: Recommended opening message}}

Newsletter content

Dear [Name],

Thank you for your interest in the Gifts in Wills Accelerator Kit. We are excited to share this resource with you.

The Accelerator Kit is a comprehensive guide that provides everything you need to know about making a will. It includes a step-by-step guide, a checklist, and a list of resources.

Here are some of the key features of the Accelerator Kit:

- Step-by-step guide to making a will
- Checklist of items to include in your will
- List of resources for further information
- Downloadable forms and templates
- Access to our online support service

We hope you find this resource helpful and that it makes the process of making a will easier for you.

Best regards,

[Signature]







EXAMPLE PREVIEW
Full ready-to-adapt template included with the
Gifts in Wills Accelerator Kit

Call to action

{{PLACEHOLDER: Recommended CTA}}

Quarter 2: Organic Social Templates

Post 2: Gifts in Wills Myth-Busting



Post copy

Did you know? Gifts in Wills are not just for the wealthy. Gifts of all sizes can make a meaningful difference.

Gifts in Wills are a simple way to leave a lasting legacy. They allow you to leave your assets to the people and causes you care about most.

Learn more about Gifts in Wills and how they can help you achieve your goals.

#GiftsInWills #MythBusting #LeaveALastingImpact #YourLegacy
#StrongerTomorrow #SupportOurMission



Suggested CTA

Learn more about Gifts in Wills



Suggested imagery

Gifts in Wills Accelerator Kit



EXAMPLE PREVIEW

Full ready-to-adapt templates included with the
Gifts in Wills Accelerator Kit

POST 2 OVERVIEW



Purpose

Build understanding by addressing a common misconception about Gifts in Wills.



Key message

Gifts in Wills are not only for the wealthy. Gifts of all sizes can make a meaningful difference.



Audience

All supporters, donors and community members.



Call to action

Learn more about Gifts in Wills.



Tone

Clear, reassuring and informative.



QUICK TIP

Focus on one misconception at a time. Keep the message simple and avoid overwhelming supporters with too much information.

Quarter 3: Gifts in Wills Supporter Story



*Bring Gifts in Wills to life by sharing the story of someone who has chosen to support your organisation's future, either through a **confirmed** or **realised** Gift in their Will.*

If you don't yet have a confirmed or realised Gifts in Wills story to share, use this quarter to share a story about a long-term supporter and their connection to your organisation.

Purpose

- ✓ Humanise Gifts in Wills.
- ✓ Build emotional connection.
- ✓ Share authentic supporter motivations.
- ✓ Help others see Gifts in Wills as accessible and meaningful.
- ✓ Encourage supporters to learn more.

When to use

Use this content to share the story of a supporter who has confirmed their intention to leave a Gift in their Will, or the story behind a realised Gift in a Will that has already made an impact.

Recommended content

- ✓ The supporter's connection to your organisation.
- ✓ Why your cause mattered to them.
- ✓ Why they chose to leave a Gift in their Will.
- ✓ Their hopes for the future or the impact of their gift.
- ✓ A gentle invitation for others to learn more.

Suggested call to action

Primary: {{Read their story}}

Secondary: {{Learn more about Gifts in Wills}}

Included templates

1. Newsletter article
2. Organic social media post

Before you hit send..

- ☐ Confirm you have permission to share the supporter's story and details.
- ☐ Agree on the final wording and imagery with the supporter, family or relevant parties where appropriate.
- ☐ Check your Gifts in Wills webpage is up to date.
- ☐ Schedule your newsletter and social content.
- ☐ Record and respond to any enquiries.

Quarter 3: Newsletter Template

Suggested headline

Placeholder suggested headline text

Suggested introduction

Placeholder suggested introductory text

Newsletter content

Your legacy. Their future. A lasting impact.

Placeholder suggested text block 1

Placeholder suggested text block 2

The future made possible



Placeholder suggested text block 3



Placeholder suggested text block 4



Placeholder suggested text block 5



Placeholder suggested text block 6

Placeholder suggested text block 7



Placeholder suggested text block 8



EXAMPLE PREVIEW

Full ready-to-adapt template
included with the
Gifts in Wills Accelerator Kit

Call to action

Placeholder suggested call to action text

Quarter 3: Organic Social Templates

Post 3: Gifts in Wills Supporter Story



Post copy

Placeholder text for the post copy, consisting of several lines of blurred text.

#LegacyOfLove #LeaveALastingImpact #YourLegacy
#SupportOurMission #GiftsInWills



Suggested CTA

{{PLACEHOLDER: Recommended CTA}}



Suggested imagery

{{PLACEHOLDER: Image recommendation}}



EXAMPLE PREVIEW

Full ready-to-adapt templates
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Gifts in Wills Accelerator Kit

POST 3 OVERVIEW



Purpose

Share a confirmed or realised Gifts in Wills story to inspire and encourage others.



Key message

A personal story highlights the impact of a legacy and shows how one decision can create a lasting difference.



Audience

All supporters, donors and community members.



Call to action

Read the story and learn how they can leave a lasting legacy.



Tone

Warm, authentic and inspiring.



QUICK TIP

Stories connect hearts. Focus on the supporter's 'why' and the impact of their gift. Always get permission and agree on the final wording and imagery.

Quarter 4: Gifts in Wills Future Impact Story



Inspire action by sharing a story that connects your organisation's impact today with what future support could help make possible.

Purpose

- ✓ Demonstrate the impact of your organisation's work.
- ✓ Build emotional connection through a real story.
- ✓ Connect your work today with your vision for the future.
- ✓ Show how a Gift in a Will can create lasting impact without costing anything today.
- ✓ Encourage supporters to learn more.

When to use

Use this content to share a real story of your organisation's impact and demonstrate how Gifts in Wills can help continue or strengthen this work for future generations.

Recommended content

- ✓ A real example of your organisation's impact today.
- ✓ The people, community or cause at the heart of the story.
- ✓ What continued support could help make possible in the future.
- ✓ How a Gift in a Will can create lasting impact without costing anything today.
- ✓ A gentle invitation for supporters to learn more.

Suggested call to action

Primary: {{Discover the impact of Gifts in Wills}}

Secondary: {{Learn more about Gifts in Wills}}

Included templates

1. Newsletter article
2. Organic social media post

Before you hit send..

- ☐ Choose a real and compelling example of your organisation's impact.
- ☐ Confirm any required permissions for stories and imagery.
- ☐ Connect the story naturally to your organisation's future.
- ☐ Check your Gifts in Wills webpage is up to date.
- ☐ Schedule your newsletter and social content.
- ☐ Record and respond to any enquiries.

Quarter 4: Newsletter Template

Suggested headline

Placeholder text for suggested headline

Suggested introduction

Placeholder text for suggested introduction

Newsletter content

Your legacy. Their future. A lasting impact.

Placeholder text for main content paragraph 1

Placeholder text for main content paragraph 2

The future made possible

-  **Beneficiary benefits**
Placeholder text for beneficiary benefits
-  **Beneficiary support**
Placeholder text for beneficiary support
-  **Beneficiary impact**
Placeholder text for beneficiary impact
-  **Beneficiary recognition**
Placeholder text for beneficiary recognition

Placeholder text for main content paragraph 3

Placeholder text for main content paragraph 4

Placeholder text for main content paragraph 5



EXAMPLE PREVIEW

Full ready-to-adapt template
included with the
Gifts in Wills Accelerator Kit

Call to action

Placeholder text for call to action

Quarter 4: Organic Social Templates

Post 4: Gifts in Wills Future Impact Story



Post copy

The [organization name] is proud to announce that [organization name] has been named one of the [number] most innovative [organization type] in the [region] by [publication name]. This recognition is a testament to the [organization name] commitment to [mission statement] and the [organization name] dedication to [impact statement].

The [organization name] is proud to announce that [organization name] has been named one of the [number] most innovative [organization type] in the [region] by [publication name]. This recognition is a testament to the [organization name] commitment to [mission statement] and the [organization name] dedication to [impact statement].

The [organization name] is proud to announce that [organization name] has been named one of the [number] most innovative [organization type] in the [region] by [publication name]. This recognition is a testament to the [organization name] commitment to [mission statement] and the [organization name] dedication to [impact statement].

#StrongerTomorrow #LastingImpact #LeaveALegacy #YourLegacy
#SupportOurMission



Suggested CTA

{{PLACEHOLDER: Recommended CTA}}



Suggested imagery

{{PLACEHOLDER: Image recommendation}}



EXAMPLE PREVIEW

Full ready-to-adapt templates included with the
Gifts in Wills Accelerator Kit

POST 4 OVERVIEW



Purpose

Show your impact today and what future support can help make possible.



Key message

Stories of today, creating impact for tomorrow.



Audience

All supporters, donors and community members.



Call to action

Discover how a Gift in a Will can create lasting impact.



Tone

Inspiring, hopeful and forward-looking.



QUICK TIP

Focus on your impact today and the future you are working towards. Always link the story to how Gifts in Wills can help create lasting change.

Year 2 and beyond

Your first 12 months are about building familiarity. What comes next is about building on that foundation.

During your first year, focus on gently introducing supporters to the idea of legacy giving through regular, light-touch communications that move from:

AWARENESS → UNDERSTANDING → CONNECTION → INSPIRATION

Over time, this consistent visibility can help Gifts in Wills become a more familiar and natural part of your supporter conversations.

Keep the momentum going

In Year Two, we recommend continuing the core activities in this plan and building on what you've learned. Review which messages generated interest, continue sharing relevant stories and keep Gifts in Wills visible throughout the year.

Depending on your organisation's priorities, goals and capacity, you may also choose to introduce additional activities, such as:

- ✓ **Supporter research or surveys** to better understand attitudes, motivations and potential interest in Gifts in Wills.
- ✓ **More targeted supporter communications** based on engagement, interests or supporter history.
- ✓ **Additional storytelling and stewardship activity** to deepen relationships with interested and confirmed supporters.
- ✓ **Paid acquisition campaigns** to reach new audiences and generate new Gifts in Wills enquiries or confirmed intentions.

Start simple. Learn what works. Build from there.

Your Gifts in Wills program doesn't need to do everything at once. Continue creating consistent opportunities for supporters to learn, connect and take the next step when the time is right.

Need support?

If you have questions or need help as you implement your Accelerator Kit, Future Impact Collective is here to support you.

Get in touch

Explore additional support