Gifts in Wills Staff Toolkit

Empowering staff to support Gifts in Wills with confidence, consistency and clarity.

Prepared for:

Life Education Trust Canterbury

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Prepared by:

Future Impact COLLECTIVE

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PURPOSE OF THE STAFF TOOLKIT

Leaving a Gift in a Will is one of the most meaningful ways a supporter can create lasting impact. Because it's a deeply personal decision, every interaction matters.

This toolkit gives staff the knowledge, confidence and practical guidance to respond consistently, support supporters with care and know when to refer enquiries.

Every interaction helps shape a supporter's experience of Life Education Trust Canterbury.

This toolkit will help you:

✓ **Build confidence** to respond to Gifts in Wills enquiries.

✓ **Deliver consistent information** and supporter experiences.

✓ **Provide clear guidance** without giving legal advice.

✓ **Know when to refer** supporters to the right person.

✓ **Help create lasting impact** through every supporter interaction.

GIFTS IN WILLS SNAPSHOT

Life Education Trust Canterbury

This toolkit has been tailored specifically for Life Education Trust Canterbury and reflects your current Gifts in Wills program, priorities and key contacts.

Strategic Priority	Gifts in Wills have been identified as an important strategic priority for Life Education Trust Canterbury.
Program Maturity EMERGING	We're at the beginning of our Gifts in Wills journey, with an exciting opportunity to build awareness, identify prospective supporters and grow our future pipeline.
Your Role	Every staff member can help create positive supporter experiences and identify Gifts in Wills opportunities.

Primary Gifts in Wills Contact

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Role: General Manager
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Our Gift in Will Goals

✓ Build awareness of Gifts in Wills
✓ Identify and support prospective Gifts in Wills supporters
✓ Build a strong pipeline for future growth
✓ Deliver consistent supporter experiences across the organisation

UNDERSTANDING GIFTS IN WILLS

A Gift in Will (also known as a bequest, legacy gift or planned gift) is a donation someone chooses to leave to an organisation through their Will after providing for family and loved ones.

For many charities, Gifts in Wills become some of their largest and most transformational gifts, helping fund programmes, services and lasting community impact.

TYPES OF GIFTS IN WILLS

Supporters may choose to leave:

- A **percentage** of their estate (often the most flexible option)
- A **specific money** amount
- A **particular asset,** such as property or shares
- The **remainder (or residual)** of their estate after loved ones have been provided for



HOW PEOPLE LEAVE A GIFT IN THEIR WILL

Most people choose to:

- Prepare a new Will with a solicitor
- Update an existing Will through a solicitor (often by preparing a new Will or adding a Codicil)
- Use an online Will service, where available
- Complete a DIY Will kit, such as a Post Office Will Kit or another legally valid Will template
- Write a handwritten (informal) Will, where legally recognised, although professional legal advice is recommended

WHY GIFTS IN WILLS MATTER

Gifts in Wills are one of the most meaningful ways supporters can create lasting impact.
After providing for family and loved ones, many people choose to leave a gift that reflects the causes and organisations they care about most.

A Gift in Will allows supporters to make a lasting future contribution without affecting their finances during their lifetime.

Most people leave a Gift in their Will only after providing for family and loved ones.

For Life Education Trust Canterbury, these gifts help:

✓ **Deliver our mission for generations to come**
✓ **Create long-term sustainability**
✓ **Invest in future programs and services**
✓ **Honour the values and generosity of our supporters**



DID YOU KNOW?

- New Zealand is experiencing one of the largest intergenerational wealth transfers in its history.
- Charitable bequests currently generate around $320 million annually, expected to exceed $1 billion within 20 years.
- Gifts in Wills deliver around 6x the average fundraising return on investment.
- Only around 1.3% of inherited wealth currently goes to charity, leaving substantial untapped potential for the sector.
- With online Will services making estate planning more accessible than ever, charities have an unprecedented opportunity to inspire more supporters to leave a lasting legacy.

Source: JBWere, The Bequest Report (2025)

GIFTS IN WILLS KEY MESSAGES

A quick reference guide to the key messages and terms every staff member should know.

✓ Family and loved ones always come first.

✓ Every gift, regardless of size, makes a difference.

✓ There is never any obligation to leave a Gift in your Will.

✓ We encourage supporters to seek independent legal advice.

✓ Gifts in Wills help ensure our mission continues for future generations.

✓ We are grateful whenever supporters choose to remember us.

KEY GIFT IN WILL TERMS



Gift in Will (Bequest)
A gift left to an organisation through someone's Will.

Beneficiary
A person or organisation who receives a gift from an estate.

Estate
Everything a person owns at the time of their death.

Executor
The person responsible for carrying out the instructions in a Will.

Will
A legal document that records how someone wishes their estate to be distributed.

Codici
A legal document used to make minor changes to an existing Will.

Probate
The legal process of validating a Will and administering an estate.

OUR ROLE IN GIFTS IN WILLS: THE 5 R'S

Whether you work in fundraising, supporter care, reception, administration, leadership or volunteer support, you could be the first person a supporter speaks to about leaving a Gift in their Will.

To help every enquiry be handled with confidence, consistency and clarity, we follow the 5 R's.

The 5 R's

Recognise | Be alert to Gifts in Wills enquiries and opportunities.

Receive | Listen, thank supporters and respect their privacy.

Respond | Provide clear, consistent information.

Refer | Connect supporters with the right contact.

Record | Record enquiries and agreed next steps.

We are not expected to:

- × Give legal advice
- × Give financial advice
- × Recommend wording for a Will
- × Influence someone's decision
- × Estimate gift value

Every conversation is an opportunity to create lasting impact.



THE 5 R'S: RECOGNISE

Supporters don't always ask directly about leaving a Gift in their Will.

Many enquiries begin as everyday conversations or simple requests for information. Recognising these opportunities helps ensure every supporter receives a warm, consistent and helpful response.

You might hear:

💬 "I'm updating my Will."

💬 "I'd like my family to remember this organisation."

💬 "Can I support your organisation after I'm gone?"



💬 "I'd like to know more about leaving a gift."

💬 "Can someone send me your Gifts in Wills Guide?"

💬 "I've already included your organisation in my Will."

💬 "I'd like to speak to someone about leaving a gift."

Remember: You don't need to have all the answers!

Simply follow the 5 R's and connect supporters with the right person when needed.

THE 5 R'S: RESPOND

Everyday Conversations

Supporters don't always mention Gifts in Wills directly. Here are some common conversations where the 5 R's can help.

If a supporter says...	You could respond...
"I'd love to support your organisation, but I can't afford to donate right now."	"There are lots of ways people choose to support our Life Education Trust Canterbury. Some supporters choose to leave a Gift in their Will. If you'd like, I can arrange for some information to be sent to you."
"I don't have a Will. It's been on my to-do list for ages!"	"You're certainly not alone! We actually partner with a free online Will platform. If you'd like, I can arrange for some information to be sent to you about creating or updating a Will and how to leave a gift to Life Education Trust Canterbury, if that feels right for you."
"I've supported you for years and I'd like to make sure you can continue this work."	"Thank you. It's wonderful to hear how much our work means to you. Some supporters choose to leave a Gift in their Will to help continue that impact. If you'd like, I can arrange some information to be sent to you."
"I've already remembered your organisation in my Will."	"Thank you so much for sharing that with us. We're incredibly grateful for your generosity. With your permission, I'd love to connect you with Michael so we can thank you properly, and keep you updated, if you'd like."
"I'm updating my Will at the moment."	"Thank you for letting us know. If you'd like, I can organise for our Gifts in Wills Guide to be sent to you, which includes the information your solicitor may need."

THE 5 R'S: REFER

Knowing when to ask for help

You don't need to have all the answers! If a supporter would like more information or asks a question you're unsure about, refer them to your Gifts in Wills contact.

Refer an enquiry when a supporter...

- ✓ Would like to discuss leaving a Gift in their Will
- ✓ Requests our Gifts in Wills Guide
- ✓ Has questions about the process or their options
- ✓ Would like to speak with someone from our team
- ✓ Asks a question you're unsure how to answer
- ✓ Advises they are acting as an executor for an estate.
- ✓ Has already included Life Education Trust Canterbury in their Will

THE 5 R'S: RECORD

Every conversation matters

Recording Gifts in Wills enquiries helps us provide timely follow-up, maintain accurate records and build meaningful relationships with our supporters.

Follow your organisation's process whenever a Gifts in Wills enquiry is received.

After a conversation with a supporter, record in your CRM...

- ✓ Supporter's name and contact details
- ✓ Date
- ✓ Brief summary of the conversation
- ✓ Information or resources provided
- ✓ Assigned Gifts in Wills contact
- ✓ Any agreed follow-up actions

Always respect a supporter's privacy and only record information in accordance with your organisation's privacy policy and internal procedures.

THANK YOU FOR PLAYING YOUR PART!

Every conversation is an opportunity to create lasting impact.

Thank you for helping Life Education Trust Canterbury build a stronger Gifts in Wills program for future generations.

Whether you answer the phone, welcome visitors, respond to emails or work directly with supporters, you play an important role in helping people create lasting impact.

Remember the 5 R's

Recognise | Be alert to Gifts in Wills opportunities.
Receive | Listen with empathy and thank supporters.
Respond | Provide clear, consistent information.
Refer |Connect supporters with the right person.
Record |Capture the enquiry and agreed next steps.

Do you have a Will?

As a valued member of our team, you're welcome to use our free online Will service. There's absolutely no obligation to leave a Gift in your Will. The service is available to help you put your wishes in place, whatever they may be.

You can access your free online Will here: everywill.co.nz/c/life-education-trust-canterbury