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# Gifts in Wills Staff Toolkit

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

Prepared for:

**The Ripple Effect Foundation**

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# PURPOSE OF THE STAFF TOOLKIT

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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 Ripple Effect Foundation.**

## 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

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## Life Education Trust Case Study

This snapshot has been tailored specifically for Life Education Trust Case Study and reflects your current gifts in Wills program, priorities and key contacts.

**Example preview**  
Full resource included with the  
Gifts in Wills Starter Kit

### Primary Gifts in Wills Contact

Michael Harding  
Gifts in Wills Manager  
michael.harding@lifeeducation.org.uk

### Key Gifts in Wills 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 experience across the organisation

# UNDERSTANDING GIFTS IN WILLS

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**Example preview**  
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# 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 Ripple Effect Foundation, 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?

- Australia is experiencing one of the largest intergenerational wealth transfers in its history.
- \$5.4 trillion is expected to be transferred through Australian estates over the next 20 years.
- Only around 1% of inherited wealth currently goes to for-purpose organisations.
- Just 6.5% of Australian Wills currently include a gift to charity, highlighting significant potential for growth.

Source: JBWere, The Bequest Report (2025)

# GIFTS IN WILLS KEY MESSAGES

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

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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

# THE 5 R'S: RECOGNISE

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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:



# THE 5 R'S: RESPOND

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## Everyday Conversations

Suggestions don't always require calls to Wills directly. Here are some common conversations where the 5 R's can help.

| The supporter says...                                                       | The staff respond...                                                                                                                                                                                                        |
|-----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| "I'd like to support you with your Wills, but I don't know where to start." | "I'd be happy to help you get started. We can talk about your Wills, and if you're able, I can help you fill out the forms."                                                                                                |
| "I don't have a Will, and I'm not sure if I should have one."               | "It's never too late to get a Will. We can talk about your Wills, and if you're able, I can help you fill out the forms."                                                                                                   |
| "The suggested you for your Wills, but I don't know where to start."        | "I'd be happy to help you get started. We can talk about your Wills, and if you're able, I can help you fill out the forms."                                                                                                |
| "I've already completed your suggested you for my Wills."                   | "Thank you so much for sharing that with us. We're incredibly grateful for your generosity. With your permission, I'd like to connect you with Michael so he can help you properly, and help you update it if you're able." |
| "I'm updating my Wills at the moment."                                      | "Thank you for letting us know. If you're able, I can suggest the new calls to Wills, which includes the information your collection may need."                                                                             |

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# THE 5 R'S: REFER

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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 to:

**Example preview**  
Full resource included with the  
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- / Would like to discuss...
- / Requests our Gifts in Wills...
- / Has questions about the process or their options
- / Would like to speak with someone from our team
- / ...to see how we can help
- / ...to see how we can help
- / ...to see how we can help
- / ...to see how we can help

# THE 5 R'S: RECORD

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Every conversation matters

Recording calls 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 call in Wills enquiry is received.

**Example preview**  
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After a conversation with a supporter, record the call in the Wills enquiries system.

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

Ensure the supporter's privacy and only record information in accordance with your organisation's privacy policy and internal procedures.

# THANK YOU FOR PLAYING YOUR PART!

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Every contribution is an opportunity to create lasting impact.

Thank you for helping Life Education Trust Community build a stronger culture in Wills for future generations.

Whether you answer welcome visitors, or work directly with people, you play an important role in helping people create lasting impact.

Remember the 3 W's

**Welcome** - Be alert to calls to Wills opportunities.  
**Wishes** - Listen with empathy and thank supporters.  
**Ways** - Provide clear, consistent information.  
Take time to connect with the right person, and agreed next steps.

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# Ready to build staff confidence around **Gifts in Wills**?

The full Staff Toolkit is included in the Future Impact Collective Gifts in Wills Starter Kit.

