



Gifts in Wills Communication Templates

Ready-to-use email templates to support your first communication with supporters at every stage of their Gifts in Wills journey.

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Welcome

Building meaningful relationships is at the heart of every successful Gifts in Wills program.

These email templates have been designed to help you confidently make the first communication with supporters as they progress through each stage of the Gifts in Wills journey.

Simply personalise each email with your organisation's details, adjust the wording to reflect your own voice and brand, and send it when a supporter reaches the corresponding stage in your CRM.

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

Remember, every interaction is an opportunity to strengthen a relationship and demonstrate the lasting impact a Gift in a Will can have.

Using this resource

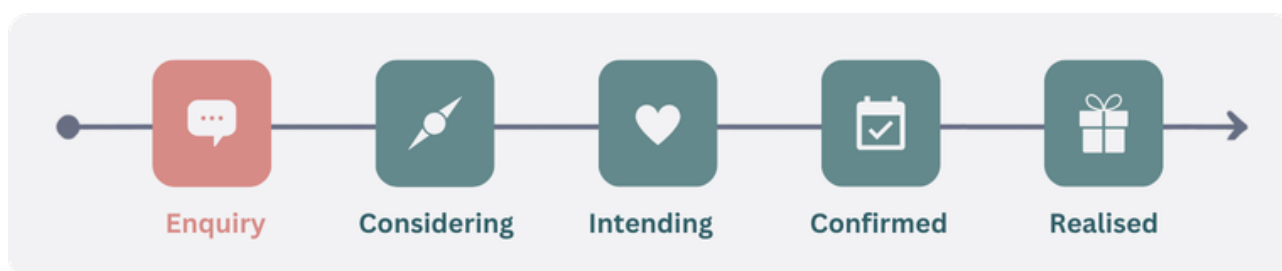
These templates align with the Gifts in Wills supporter journey and should be used whenever a supporter progresses to a new stage.

For each communication:

- ☐ Personalise the email with the supporter's name.
- ☐ Use your organisation's tone of voice.
- ☐ Attach any relevant Gifts in Wills resources.
- ☐ Record the communication in your CRM.
- ☐ Schedule the next stewardship action.

Stage: Enquiry

A supporter has requested information about leaving a Gift in their Will.



When to send

Send this email as soon as someone contacts your organisation to request information or ask about leaving a Gift in their Will.

Purpose

- ✓ Thank them for their enquiry.
- ✓ Acknowledge their interest.
- ✓ Provide helpful information.
- ✓ Keep the conversation open.

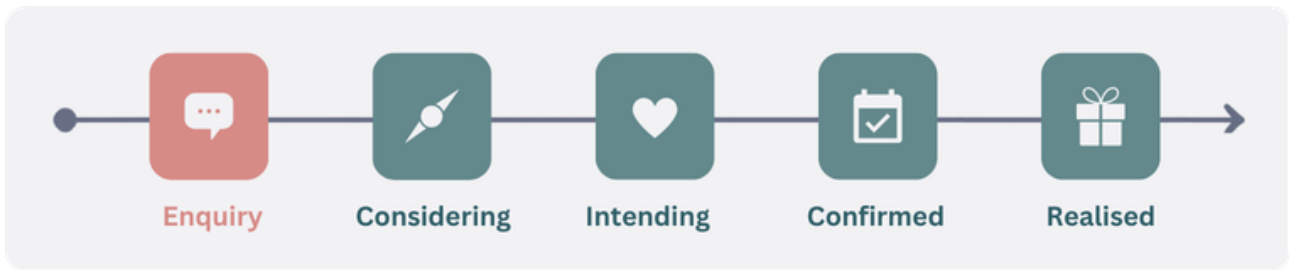
Suggested Attachments

- ✓ Gifts in Wills Guide
- ✓ Recent impact report or newsletter
- ✓ Contact details for further support

CRM Reminder

- ☐ Record the enquiry in your CRM.
- ☐ Update supporter stage to **Enquiry**.
- ☐ Record the communication.
- ☐ Schedule the next stewardship action.

Enquiry Email Template



To	[Email Address]
Subject	Thank you for your interest in leaving a Gift in your Will

Hi {{First Name}},

Thank you for getting in touch about leaving a Gift in your Will to {{Organisation}}.

We're so grateful you're considering supporting our work in this special way.

Attached is our Gifts in Wills Guide, which explains how a gift can be included in your Will and the lasting impact your generosity can have.

If you have any questions, or would like to know more about leaving a Gift in your Will, we'd be delighted to help.

Thank you again for considering a future gift to {{Organisation}}. Your interest means a great deal to us, and we look forward to supporting you in any way we can.

Warm regards,

{{Name}}

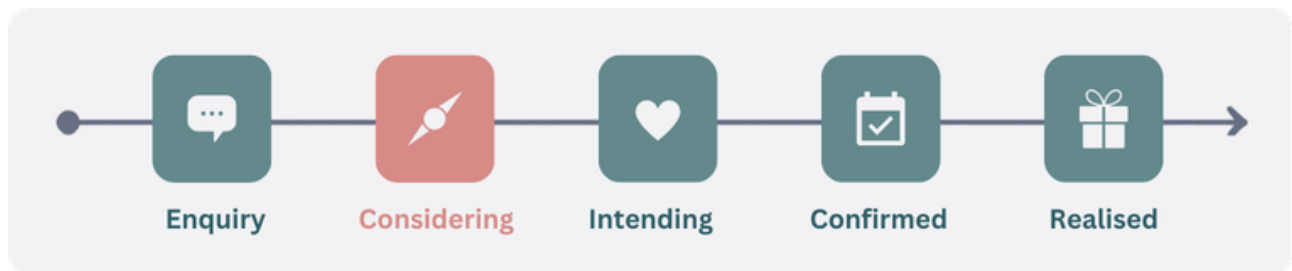
{{Position}}

{{Organisation}}

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

Stage: Considering

A supporter is actively considering leaving a Gift in their Will.



When to send

Send this email when a supporter indicates they are actively considering leaving a Gift in their Will and would appreciate additional information or support.

Purpose

- To thank the supporter for considering a future gift.
- To reinforce the impact of their potential gift.
- To offer support and information.
- To continue building a relationship.

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

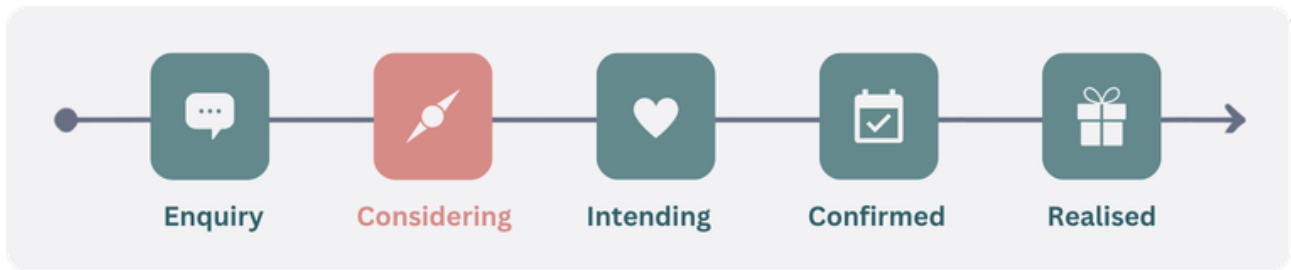
Suggested Attachments

- Gifts in Wills Guide
- Recent Impact report or newsletter
- Contact details for further support

CRM Reminder

- ☐ Update supporter stage to Considering
- ☐ Record the communication.
- ☐ Note any questions or interests shared by the supporter.
- ☐ Schedule the next stewardship action.

Considering Email Template



To	[Email Address]
Subject	Thank you for considering a future gift

Hi {{First Name}},

Thank you for getting in touch about leaving a Gift in your Will to {{Organisation}}.

We're so grateful you're considering supporting our work in this special way.

Attached is our Gifts in Wills Guide, which explains how a gift can be included in your Will and the lasting impact your generosity will have.

If you have any questions, or would like to talk about leaving a Gift in your Will, we'd be delighted to help.

Thank you again for considering a future gift to {{Organisation}}. Your interest means a great deal to us, and we look forward to supporting you in any way we can.

Warm regards,

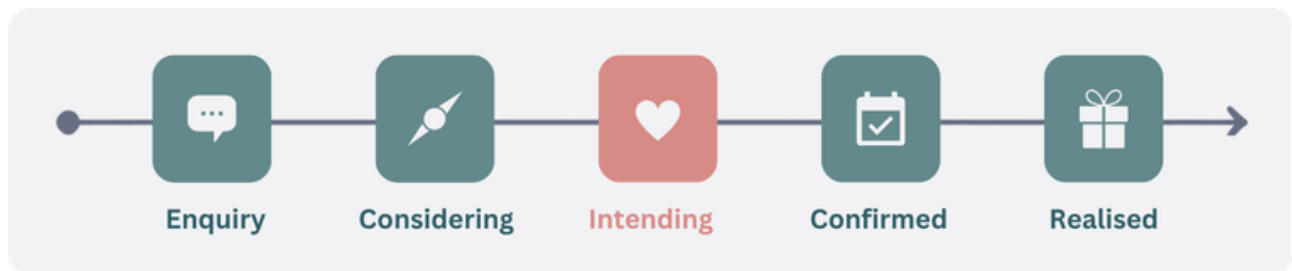
{{Name}}

{{Position}}

{{Organisation}}

Stage: Intending

A supporter has told you they intend to leave a Gift in their Will.



When to send

Send this email when a supporter indicates they are actively considering leaving a Gift in their will and would appreciate additional information or support.

Purpose

- ✓ Thank them for considering a future gift.
- ✓ Reassure the supporter.
- ✓ Offer support.
- ✓ Continue building the relationship.

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

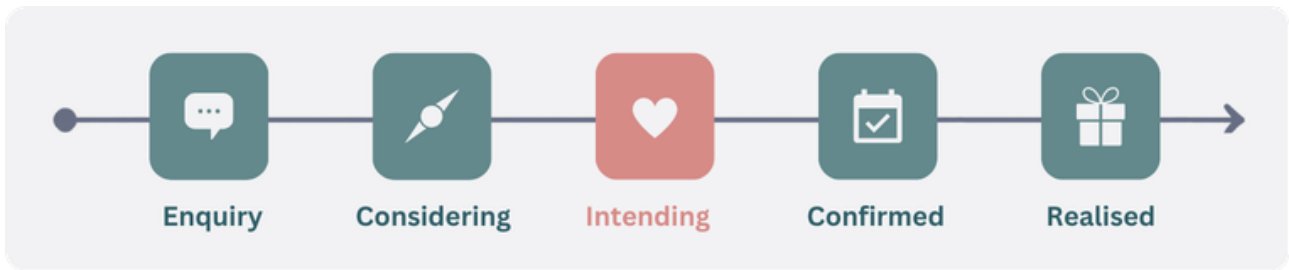
Suggested Attachments

- ✓ Gifts in Wills Guide
- ✓ Recent Impact report or newsletter
- ✓ Contact details for further support

CRM Reminder

- ☐ Update supporter stage to Considering
- ☐ Record the communication.
- ☐ Note any questions or interests shared by the supporter.
- ☐ Schedule the next stewardship action.

Intending Email Template



To	[Email Address]
Subject	Thank you for letting us know

Hi {{First Name}},

Thank you for getting in touch about leaving a Gift in your Will to {{Organisation}}.

We're so grateful you're considering supporting our work in this special way.

Attached is our Gifts in Wills Guide, which explains how a gift can be included in your Will and the lasting impact your generosity will have.

If you have any questions, or would like to talk about leaving a Gift in your Will, we'd be delighted to help.

Thank you again for considering a future gift to {{Organisation}}. Your interest means a great deal to us, and we look forward to supporting you in any way we can.

Warm regards,

{{Name}}

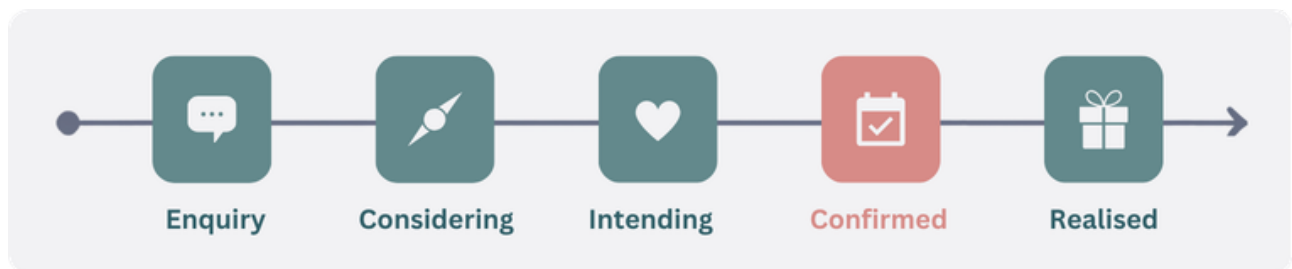
{{Position}}

{{Organisation}}

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

Stage: Confirmed

A supporter has confirmed they have included your organisation in their Will.



When to send

Send this email when a supporter indicates they are actively considering leaving a gift in their will and would appreciate additional information or support.

Purpose

- ✓ Thank them for considering a future gift.
- ✓ Reinforce the impact of their gift.
- ✓ Offer support.
- ✓ Continue building the relationship.

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

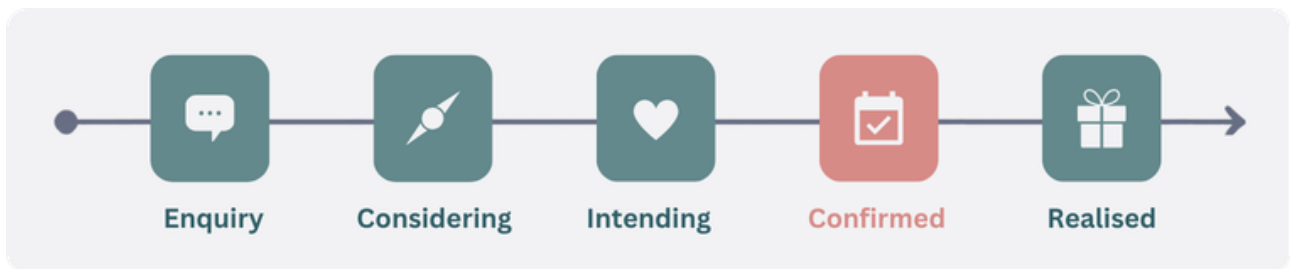
Suggested Attachments

- ✓ Gifts in Wills Guide
- ✓ Recent Impact report or newsletter
- ✓ Contact details for further support

CRM Reminder

- ☐ Update supporter stage to Considering
- ☐ Record the communication.
- ☐ Note any questions or interests shared by the supporter.
- ☐ Schedule the next stewardship action.

Confirmed Email Template



To	[Email Address]
Subject	Thank you for your incredible generosity

Hi {{First Name}},

Thank you for getting in touch about leaving a Gift in your Will to {{Organisation}}.

We're so grateful you're considering supporting our work in this special way.

Attached is our Gifts in Wills Guide, which explains how a gift can be included in your Will and the lasting impact your generosity will have.

If you have any questions, or would like to talk about leaving a Gift in your Will, we'd be delighted to help.

Thank you again for considering a future gift to {{Organisation}}. Your interest means a great deal to us, and we look forward to supporting you in any way we can.

Warm regards,

{{Name}}

{{Position}}

{{Organisation}}

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