

# GREAT LEGACY FUNDRAISING MASTERCLASS

19 - 21 . NOVEMBER . 2018



## Great Legacy Fundraising

with Dr Claire Routley, Alan Clayton and Ashley Rowthorn

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19-21 November 2018

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£995 + VAT\*

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VAT charged at 20%

The next 30 years will see the largest intergenerational transfer of wealth in human history. And with more donors leaving more legacy gifts to charity than ever before, there is an unprecedented opportunity for charities to grow their legacy income. But many charities fail to communicate effectively with their donors – lacking the skills and confidence to engage their organisation in the conversation, or failing to articulate a clear and compelling reason for their donors to give.

This seminar will give you insight into our new major research project, produced by the Hartsook Centre for Sustainable Philanthropy. The **ground-breaking report** on the motivations of legacy giving brings together relevant thinking from over 150 academic studies and translates it into a model for how - and crucially why - donors leave legacy gifts to charity.

This in-depth seminar will unpack everything there is to know about how to engage your donors in the legacy conversation and encourage more of them to leave a gift in their will.

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"I had been looking for a legacy-specific fundraising course for some time, and Great Legacy Fundraising exceeded my expectations. The three speakers were experts in the field, and the sessions were all relevant and inspiring. I came away excited to revamp our legacy programme, with lots of evidence-based ideas, and a practical understanding of how to put those ideas into practice. Great value for money, and I would heartily recommend to anyone looking to further their understanding of legacy fundraising."

Alice Sockett, Legacies and In Memoriam Gifts Development  
Cardiff University

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## You will learn how:

- How legacy giving is changing and how you will need to adapt to a new generation of donors.
- The core motivations why donors leave gifts to charities in their wills and how your organisation needs to act to be attractive to legacy donors.
- How to create powerful communications that speak to the core motivations of your donors and have a lasting impact.
- How to unite your organisation behind you and make your team proud of your legacy fundraising.
- What the research tells us about how legacy donors think – and how donor-centred thinking is key to successful legacy fundraising.
- How to facilitate difficult conversations through the power of stories.
- How taking care of the donor's wishes post death can increase the impact of the gift, and protect your risk and reputation.

## Learning style

The content of the Great Legacy Fundraising seminar is formed by a unique mix of academic research and case studies, with particular reference to a major literature review commissioned by Legacy Voice in 2017 and building on Alan Clayton's Great Fundraising Report. Attending this in-depth, exclusive seminar will leave you with a list of 'must-do' actions to be implemented immediately on your return.

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"Lots of practical help coupled with a wealth of all the latest information and research around legacies. Thanks to Legacy Voice and all the seminar leaders who taught us so many valuable things in such a short time. I would highly recommend you attend."

**Robert Russell, Head of Donor Support and Development  
Scottish Bible Society**

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## Who should attend?

You are not necessarily a legacy fundraiser but you are a leader. This seminar is for chief executives, executive team members, trustees, directors, heads of fundraising and legacy managers. Anyone looking to prepare their organisation for legacy growth or to see a step change in their legacy income.

## Where?

The Inch, with its gorgeous location overlooking Scotland's most famous loch, is a place of inspiration, perspective and energy. It is a perfect retreat from the hustle and bustle of daily life to enable you to focus on growing your organisation.

To find out more visit [inchhotel.com](http://inchhotel.com)

## When?

**19-21 November 2018**

The seminar begins at 13:00 on Monday 19th November 2018 and finishes at 13:00 on the 21st of November 2018. Please plan to arrive on the morning of the 19th, or talk to us if you need to arrive on the evening of the night before. Your attendance fee covers all sessions, as well as seminar materials, accommodation, food, and your transfer from Inverness Airport or train station.

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## Tutors

### Dr Claire Routley

One of the leading academic thinkers in the field of legacy giving. Dr Claire Routley has worked in fundraising for fourteen years, specialising in legacy fundraising for the last ten. In 2011, she completed a PhD looking at why people choose to leave legacies to charity. She has worked for Bible Society, Age UK, WRVS and a local hospice, and is a tutor for the Institute of Fundraising's qualification courses. She is now a fundraising consultant, and a research fellow at Plymouth University's Hartsook Centre for Sustainable Philanthropy. She is also a member of fundraising think tank Rogare's international advisory panel, and was recently named AFP's emerging scholar 2017.

### Alan Clayton

Alan works in the inspiration and creative business, for charities, non-profits and NGOs globally. He is a force for rapid and dramatic change and growth, with people power at the front of his philosophy. After a career in national charities, he spent ten years running a full service agency, then formed Revolutionise in 2008. Alan has worked with over 320 clients around the world. He specialises in pitch-winning creative insight and strategy, donor insight, emotional communication and motivation. Alan is also Creative Director at Legacy Voice and managing partner of the Inch Hotel and Inspiration Centre, Loch Ness.

### Ashley Rowthorn

Ashley Rowthorn has spent the last 10 years immersed in legacy giving. Starting out in a regional role, having legacy conversations in the community, to managing national legacy marketing campaigns, and becoming a member of Remember a Charity's campaign council.

Today he runs the UK's leading legacy giving consultancy - Legacy Voice, a specialist fundraising agency, dedicated to helping charities raise more money through the power of conversation, and Legacy Link, a legacy administration consultancy, which takes care of its charities legacy gifts through its network of experienced Legacy Administration Officers. Together, they support charities right through the legacy journey, and work with over 50 charities, bringing in more than £100m in legacy income in 2016.

## Venue

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"Great Legacy Fundraising is brilliant and I would highly recommend it to anyone who views legacies as an important part of their income portfolio. I have come away with a greater degree of insight and some clear actions to take, which I know will improve our performance and the experience of our donors. We came away with a renewed vigour and even more passion for our work."

Claire Irving, Director of Income Generation and Marketing  
St Catherine's Hospice

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