LSS Legacy Strategy Summit

23rd June 2026
Online Conference

Smee&Ford | Legacy Futures

Agenda

0945-1030 Welcome & Housekeeping, followed by Location & Legacy Giving: Mapping the Geography of Generosity Across the UK

Suzanne Watts, Senior Producer, Smee & Ford
Mark Pincher, Smee and Ford
Jo Masini, Legacy Futures
Dan Walton, Legacy Futures

In our opening session, we'll explore the latest legacy data and emerging trends, with a special focus on regional differences in giving across the UK. From where donors leave the highest-value gifts to how cause preferences vary by location; we'll uncover how generosity differs and has evolved across the country. With practical insights into geographic patterns in legacy giving, the session includes:

- Regional trends in legacy income and donor behaviour.
- How causal preferences vary across various parts of the UK.
- Clear geographic insights to inform targeting, messaging, and long-term planning.

1030-1045 Break

1045-1135 Big, Bold Legacy Campaigns that Shout Loud

Elle Cohen, Senior Legacy Marketing Manager, Shelter
Ben Mann, Co-Founder, Proper Good Films
Alastair Acton-Roberts, Legacy Marketing & Individual Giving Manager, BLESMA
Becca Longman, Legacy Marketing Executive – Individual Giving, Amnesty International UK

In a crowded marketplace where legacy campaigns compete for attention, how can your organisation stand out? Is your campaign message bold enough to inject new energy into your brand? In this session, we look at three innovative campaign videos that moved away from more traditional legacy imagery to demand attention and capture the interest of supporters.

The session will:

- Explore how very different charities created attention-grabbing legacy adverts.
- Reveal the journey behind these campaigns.
- Spotlight successful approaches to internal stakeholder management.
- Examine the impact on pledges and public awareness.

1135-1150 Break

1150-1220 Small Team, Big Ambition: Transforming a Hospice Legacy Programme with Limited Resource

Jenny Connolly, Gifts in Wills Manager, Hospice In The Weald
Sequoia Tappenden, Hospice In The Weald

Can a small team build a comprehensive legacy programme from the ground up? This session explores how one hospice transformed its approach to legacy giving with just two part-time specialists.

In this session attendees will how hear how small teams can shift towards a more focused, disciplined legacy strategy by:

- Leveraging internal expertise and support for legacies, including trustees and board members.
- Stewarding legators families and pledgers to share their stories and build lasting connection.
- Embracing all opportunities to learn and evolve in your role.
- Raising awareness of the key role that legacies play in securing future funding.

1220-1235 Break

1235-1305 Growing together: Collaborative & Supportive Legacy Strategies

Sam Gee, Senior Individual Giving Officer, The Wildlife Trusts

Could partnering with like-minded charities help your legacy programme flourish? Discover how 46 Wildlife Trusts and their umbrella charity use collaboration to strengthen legacy giving and explore how similar approaches can be applied across charities of any size, cause or structure—including regional teams within national organisations.

Through real examples, you'll discover how shared tools, knowledge and aligned goals can enhance your legacy programme and maximise impact. Find out how to:

- Build a stronger, more joined-up legacy strategy through collaboration.
- Share ability and offer practical support across teams and organisations.
- Apply and embed best practice, from legacy administration to sector insight.
- Support smaller or single-person teams through shared approaches to common challenges.
- Develop useful shared resources, such as engagement guides and self-assessment tools.

1305-1400 Lunch

1400-1445 Legacy Events that Convert: Turning Curiosity into Commitment

Felicity James, Legacy Relationship Manager, Alzheimer's Research
Matt Smith, Head of Legacy & In-Memory Giving, Alzheimer's Research
Hannah Filer, Legacy and In Memory Officer, Dorset Wildlife Trust
Daisy Meadowcroft, Wild Woodbury Ranger, Dorset Wildlife Trust

With ever growing pressure to secure new legacy pledgers and meet raised income targets, legacy events must work harder than ever. Traditional formats have evolved, as many supporters want more engaging, interesting and meaningful experiences.

Join us to examine two standout legacy events, and find out how to:

- Design interactive, memorable event formats with contrasting budgets.
- Move supporters from awareness to action.
- Use proven techniques to increase the potential for new bequests.

1445-1500 Break

1500-1525 Be Prepared: Building Internal Support for Legaacies at Girlguiding

Mairi Wilson, Public Fundraising Manager, Girlguiding UK

There can be extra hills to climb when trying to scale up enthusiasm for legacies in a large, historic organisation. In this session, we'll learn how Girlguiding UK is reinvigorating legacy giving across its nationwide 115-year-old movement and building fresh momentum around gifts in wills.

You'll gain practical tips on how to:

- Reposition legacy fundraising in an established charity.
- Engage and inform staff, volunteers, and stakeholders.
- Build legacy support across regional branches.
- Secure budget, resources, and colleague pledges for legacies.

1525-1540 Break

1540-1620 The Journey from Major Donor to Transformational Legacy Gift

Dominic Myers Green, Head of Supporter Giving + Legacies, Asthma and Lung UK
Claire Routley, Consultancy Director, Legacy Futures
Anna Turner, Head of Research and Insight, Legacy Futures
Caroline Reynold, Senior Legacy and In-Memory Fundraising Leader, UNICEF

How do high-net-worth (HNW) supporters become major legacy donors? This panel draws on in-depth research and real-world experience to explore the HNW donor mindset—what drives their decisions, how they view legacy, and how charities can build the trusted relationships that lead to transformational gifts.

The panel will explore:

- What in-depth research reveals about the HNW donor mindset and motivations?
- Who should lead these relationships—major donor or legacy teams?
- How to steward supporters towards a significant legacy commitment.

1620-1630 Round up, end of day & closing survey

If you attended the conference, please click here to complete our closing survey - your feedback is greatly appreciated and used to inform our future conferences.

On demand sessions overleaf

On demand

From Nostalgia to Legacy: Building a Giving Programme That Resonates with Alumni

Liesbeth Van Biezen, Senior Relationship Manager, Leiden University Fund

With the publication of a draft Will Bill, now is a critical moment for charities to reflect on the proposed reforms. Join experts Stephen Richards, Natasha Stourton, and Alice Tomlin of Withers LLP as they unpack the Law Commission’s Modernising Wills report, focusing on the key recommendations, and clarifying the potential impact for the charity legacy sector.

This session will explore:

- The most relevant proposals for charities
- The potential benefits of simplifying will-making
- Safeguarding concerns for vulnerable benefactors
- How the Will Bill might shape the future of will-making legislation

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On demand

Legacy Conversations Across Cultures: Rethinking Who We Engage and How

Rhonda Sogren, Associate Director, Legacy and Planned Giving, North York General Foundation

Legacy giving in has often focused on familiar donor profiles, but what happens when we expand that lens? This session explores how to authentically engage underrepresented and culturally diverse communities in legacy conversations. Drawing on hands-on experience leading community-based estate planning initiatives across Canada, Rhonda shares practical insights on building trust, navigating cultural nuance, and creating space for meaningful dialogue.

On demand **Creating Authentic Legacy Campaigns in an Era of Distrust**
Edward Dark, CEO and Co-Founder, Catsnake: The Story Agency

We live in an era that is increasingly shaped by misinformation, audience scepticism, and polished narratives. So how can legacy campaigns create genuine and positive emotional connections with its audience, and increase legacy pledges?

In this interview with Ed Dark, we explore the role of authenticity in storytelling, how to capture the power of real voices, and whether assumptions about audience types are limiting creativity and impact of new legacy campaigns.

On demand **Legacy Giving in Italy - Raising Awareness & Driving Progress in a Challenging Legal Landscape**
Giovanna Bonora, Senior Consultant and International Fundraiser

Italy’s legacy sector operates within strict legal constraints, where mandatory succession rules limit legacy gifts and cultural attitudes keep giving largely private. The result is a smaller, less visible market than the UK - but one that is steadily developing.

In this session, Giovanna explores how Italian charities are building momentum through collaboration, public awareness campaigns, and a patient, education-led approach. From navigating legal limitations to reshaping donor understanding, this session offers a candid view of progress in a complex landscape.

She will reveal:
- The propensity for legacy giving in Italy
- How legal frameworks shape legacy giving potential
- Approaches to educating donors (and charities)
- The benefits of collaboration in building sector momentum
- Why patience and long-term stewardship are making an impact

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