



Legacy
Strategy
Summit

Smee&Ford

Legacy
Futures

23rd June 2026
Online Conference

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 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 Legacies 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.



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On demand **Modernising Wills: What the Law Commission's Proposals Mean for Charity Legacy Teams**

Stephen Richards, Natasha Stourton and Alice Tomlin
Withers LLP

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

On demand **International legacy fundraising during global change: challenges and opportunities**

Chair: Lena Vizy, Legacy Giving EU, Legacy Futures
Beatrice Heintz, International Legacy Specialist, Four Paws
Beth Brook, Head of Legacy and In Memory Fundraising, Action Aid
Sinem Bilen Onabanjo, Head of Legacy Engagement, Oxfam

We hear from a panel of legacy fundraisers working within international charities that, due to changing Government priorities and uncertain economic times are facing new challenges and obstacles. The panel will discuss:

- Reacting to and adapt to change - what did we learn from other challenging times (like the pandemic)?
- Keeping your senior leadership team on your side during challenging times
- Finding the silver linings - how your legacy campaign can benefit from global uncertainty
- How to reach and connect with donor audiences - adapting comms and messaging

On demand **Assessing the “legacy readiness” of your supporter base**

Claire Routley, Consultancy Director, Legacy Futures
Ivor Williams, Honorary Practice Fellow, Imperial College London and Founder, Mortals

We hear how a 70+ year old charity is utilising its national network of skilled volunteers to spread the word on legacy giving - and stretch its legacy campaign resource. The session will look at the challenges & benefits of engaging with a large team of volunteers whilst maintaining a consistent and empowering legacy message, and will offer best practise examples of:

- What volunteers can bring to Gifts in Wills marketing
- How to engage with volunteers
- What are the challenges and considerations of working with volunteers?

On demand **Transforming in-memory giving: Bowel Cancer’s Stewardship Pathway**

Emma Moffat, Public Fundraising Officer, Bowel Cancer UK

Over the past two years, Bowel Cancer UK has completely overhauled its In-Memory services, creating a gold-standard donor journey and stewardship model. Join us for an in-depth look at this exemplary case study, exploring the charity’s refreshed, enhanced, and reimagined In-Memory programme.