



Legacy
Strategy
Summit

24th June 2025
Online Conference

Agenda



Smee&Ford

Legacy
Futures

0930-0940 **Introduction and welcome from Smeë & Ford**
Suzanne Watts, Senior Producer, Smeë & Ford

0940-1020 **Legacy giving trends in our time**
Mark Pincher, Head of Data, Smeë & Ford
Doug Clow, Head Analyst, Legacy Futures

We hear from Mark Pincher and Doug Clow on how the legacy giving trends seen in the full year 2024 compare with recent years. Doug will consider how the uncertain economic landscape can influence donor's legacy giving preferences in the short term.

Forecasting

Insight

Analysis

1020-1035 **Break**

1035-1110 **Driving forward digital innovation in legacy giving**
Lucy Day, Legacy Marketing & Stewardship Manager, EAAA
Matt Casear, Head of Digital and Marketing, EAAA

Join us for an insightful session exploring how digital innovation can revolutionise legacy giving strategies. Discover how to improve audience engagement, streamline legacy pledger acquisition, and elevate your charity's brand profile through these transformative digital approaches.

Innovation

Digital Strategy

Inspiration

1110-1130 **Break**

1130-1210 **Having faith in a collaborative approach to legacy fundraising**

Chairperson: Chris Lincoln, Key Account Manager, Sme & Ford
Abigail McMillan, Head of Legacy Fundraising, CAFOD
Christine Reidy, Consultant and Project Manager at YCL
Jonathan Heard, Chair of YCL and Deputy Director, Stella Maris

After 10 years of working together, Your Catholic Legacy (YCL), set out to research if their collaborative approach to legacy fundraising was working. A must-view for smaller charities that need to maximise their resource and brand and anyone wanting to work in collaboration.

The session will cover:

- Why 'Your Catholic Legacy' was formed & what it hoped to achieve.
- How the collaboration works & what it delivers on a shoestring budget
- What the research by Legacy Futures has found
- How 'Your Catholic Legacy' benefits one of its members, CAFOD

Collaboration

Small Charity

Fundraising Strategy

1210-1225 **Break**

1225-1255 **Creating impact with a bold DRTV campaign**

Katie Wallman, Legacy and In Memory Manager, Leukaemia UK

In a crowded sector with an increasingly busy legacy campaign calendar, how can a charity stand out with a bold new DRTV campaign? Join us as we explore Leukaemia UK's ambitious legacy strategy including:

- Why & how they launched their campaign
- Timing a message for maximum impact
- Steps to boosting charity brand awareness
- Growing a pledger pipeline - results so far

Legacy Campaigns

Strategy

Brand Awareness

1255-1300 **Summary and close of morning sessions**

1300-1400 **Lunch**

1400-1445 **Building meaningful connections: Putting the personal touch in your legacy events**

Joanne Till, Legacy & In Memory Fundraiser, Compton Care
Emma Fellows, Legacy Marketing Manager, Motor Neurone Disease

Gain valuable inspiration from two sector-leading case studies, packed with innovative ideas to enhance the impact and increase the success of your legacy events, whilst staying true to the heart and mission of your charity.

Learn how to:

- Balance acquisition strategy with creativity
- Ensure your legacy events leave a lasting impression
- Reflect your organisation's unique brand & retain a personal, human touch

Personal Touch

Legacy Events

Acquisition Strategy

1445-1500 **Break**

1500-1530 **Unlocking the potential of in-memory fundraising**

Kate Jenkinson, Head of In Memory, Legacy Futures
Anna Turner, Head of Research & Insight, Legacy Futures

Drawing on recent research, we take a fresh look at some emerging opportunities in the in-memory market, and see how charities of all kinds can take action to enhance their offering. Gain valuable insights into how you can inspire this audience to connect with your organisation, refresh the engagement of your existing in-memory base, and attract new supporters

Analysis

In Memory

Innovation

1530-1545 **Break**

1545-1625 Samaritans' journey to volunteer-led legacy engagement
Amber Jagot, Head of Legacies & Supporter Care, Samaritans

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?

Volunteering

Resource Management

Strategy

1615-1630 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 **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

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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 reimaged In-Memory programme.



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