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# New Year, New Legacy

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Content recommendations  
to promote online wills  
and digital bequests in early 2025.



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# Introduction



In January, a combination of factors - both internal and external - come together to create a golden opportunity for gifts in wills fundraisers.

Externally, January is one of the few times of year when finances and life admin are top of mind for many Australians. Many people also take pause at the start of a new year to consider the major life events of the previous 12 months. Events which may require an update to their estate plan.

Reaching out to supporters with a free tool aligns with both of these goals or mindsets. It's a timely offer, and it's genuinely helpful.

Internally, January is also a prime time for many charities and NFPs to schedule supporter outreach.

With extended holidays common over the Christmas break, many NFPs are operating at reduced capacity in December and January - but online wills can be a low-touch initiative, prepared in advance and requiring minimal time or financial investment.

This guide has been created to help any fundraisers short on time but eager to promote online wills and digital bequests in the New Year.

It's packed with practical campaign recommendations and copy templates, to give your New Year outreach the best chance of success.

We hope you find it useful and are able to start your 2025 gifts in wills fundraising with a bang.

# Campaign recommendations



## **Cast a wide net**

Contact all adult supporters with an email address

To give yourself the best chance of generating gifts in wills, we recommend reaching out to the highest number of supporters possible. Unlikely demographics have sometimes been found to be the most willing bequestors.



## **Create a three-part series**

Send three emails to supporters, over three weeks

Many charities have found the third email in a three-part series to supporters is actually the most effective at generating gifts. However, for staff and volunteers, we recommend sending one email only.



## **Update your landing page**

Ensure messaging is up to date and impactful

Review your online will landing page and make any necessary updates. We recommend including messaging around the importance of having a will, as well as the potential impact of pledging a gift.



## **Create unique tracking links**

For Premium partners only

Create a unique tracking link in the GMP so you can analyse the success of each individual email.



## **Reach high-intent will-writers**

For Premium partners only

High-intent will-writers arrive on Gathered Here independently of any campaign or promotion. They are highly-likely to write a will. [Top up Credits in the GMP](#) or speak to your Partner Success contact about how you can reach them.

# Email recommendations



## Prioritise will-writing

Focus on the importance of estate planning, not gifting

Encouraging supporters to write a will is the biggest barrier to securing a gift. Once they write a will, one in three will pledge a gift to your cause. Focus on the importance of will-writing to help them overcome that initial barrier.



## Be personal

Your emails should be sent from a single person

Instead of signing off your emails from a team or organisation, find a suitable figurehead who can speak to the importance of writing a will and pledging a gift. Be authentic and personal wherever possible.



## Avoid will-writing imagery

Opt for family-focussed or cause-related imagery

Our tests have shown will-writing imagery does not compel charity supporters to write a will. Family-focussed or cause-related images drive higher conversion rates.



## Segment your database

Create comms specific to different support groups

If you have time, consider segmenting your supporter base and creating comms specific to each group. This can help you hone your messaging and better connect with supporters in a way that suits them.

# Subject lines

## Tips

- **Add personalisation** Use their name. Personalised subject lines typically increase open rates by more than 20%.
- **Keep it short** Subject lines with 6-10 words have the highest open rates.
- **Consider a question** Asking a question can cause a reader to slow down and consider your cause more carefully.
- **Convey urgency** When appropriate, encourage people to act now (or quickly).
- **Offer a gift or thank you** Frame the online will as a benefit to supporters.

## Examples

☆ Koala Care	Inbox	Get peace of mind in 2025 - Write your will, for free, today	
☆ Women's Network	Inbox	A 10-minute task could protect your family, and fight [CAUSE].	Wave 1
☆ Vision NSW	Inbox	A New Year gift for our supporters	
☆ Earth Heart	Inbox	Why we're offering all of our supporters a free online will	
☆ Children First	Inbox	Protect your family. Protect the [Cause]. Write your free will today.	Wave 2
☆ Friendly Doctors	Inbox	[Charity] supporters can claim a free online will	
☆ Community Counsel	Inbox	[Name], have you claimed your free online will yet?	
☆ Conservation TAS	Inbox	[Name], there's still time to get involved....	Wave 3
☆ New Start	Inbox	[Name] there's still time to claim your free online will	

# Email templates - Supporters

EMAIL 1 OF 3

## A New Year gift



Hi [First Name],

Happy New Year! I hope you've had a restful break, reminisced on old memories, and made some new ones with friends or family.

I have been thinking of everything [Charity] has achieved over the past 12 months - [2-3 ACHIEVEMENTS] - and I wanted to express my heartfelt gratitude. None of that would be possible without your incredible support.

I have also been thinking of friends and family who, sadly, are no longer with us. The memories and the legacies they leave behind, the grief when we lose someone close to us. It's why I'm proud to say we've partnered with Gathered Here, Australia's most-trusted provider of free online wills, to bring our supporters easy access to a free, online will.

Having a will in place can save your loved ones emotional and financial heartache at an already-stressful time - yet only half of Australians have one. To help close the gap, we've partnered with Gathered Here to bring all of our supporters easy access to a free will.

[Write your free will today](#)

If you choose to write your will with Gathered Here, you'll be asked if you'd like to include a gift to [Charity], or any other charity. These gifts are transformational for [Charity]. They ensure we're able to protect the work we do for generations to come, ensuring a future free from [Charity Target].

But, I want to stress that there is no obligation to leave [Charity] a gift. You can still take advantage of this offer, and put an estate plan in place to support those closest to you. We hope you do.

If you're considering including a gift in your will, or already have, we'd love to celebrate that with you. Just get in touch with our gifts in wills team at [Contact Information] to chat about your generous gift.

Thank you again for your ongoing support and have a wonderful 2025.

With warmest regards,  
[CEO or GiW Manager]



GiW Manager/CEO

P.S. If you do decide to write your will via Gathered Here, you can also update it as many times as you like, for free. [Click here to get started.](#)

Create an eye-catching banner, with a positive cause-related image.

Begin with a thanks for their previous support.

I have been thinking of everything [Charity] has achieved over the past 12 months - [2-3 ACHIEVEMENTS] - and I wanted to express my heartfelt gratitude. None of that would be possible without your incredible support.

Stress the importance and impact of having a will.

I have also been thinking of friends and family who, sadly, are no longer with us. The memories and the legacies they leave behind, the grief when we lose someone close to us. It's why I'm proud to say we've partnered with Gathered Here, Australia's most-trusted provider of free online wills, to bring our supporters easy access to a free, online will.

Add a visual button to your email, rather than a hyperlink.

Having a will in place can save your loved ones emotional and financial heartache at an already-stressful time - yet only half of Australians have one. To help close the gap, we've partnered with Gathered Here to bring all of our supporters easy access to a free will.

[Write your free will today](#)

Create a custom tracking link in the GMP so you can measure the success of your campaign.

If you choose to write your will with Gathered Here, you'll be asked if you'd like to include a gift to [Charity], or any other charity. These gifts are transformational for [Charity]. They ensure we're able to protect the work we do for generations to come, ensuring a future free from [Charity Target].

Link to your landing page, rather than your online will platform.

But, I want to stress that there is no obligation to leave [Charity] a gift. You can still take advantage of this offer, and put an estate plan in place to support those closest to you. We hope you do.

Mention the ongoing impact of gifts in wills, but let supporters know they're not obligated to pledge a gift.

If you're considering including a gift in your will, or already have, we'd love to celebrate that with you. Just get in touch with our gifts in wills team at [Contact Information] to chat about your generous gift.

Thank you again for your ongoing support and have a wonderful 2025.

Encourage supporters to share their decision with you.

With warmest regards,  
[CEO or GiW Manager]



GiW Manager/CEO

Sign off from an individual and include a photo and signature, for a personal touch

P.S. If you do decide to write your will via Gathered Here, you can also update it as many times as you like, for free. [Click here to get started.](#)

Add another link to your landing page

# Email templates - Supporters

EMAIL 2 OF 3



Create an eye-catching banner, with a positive cause-related image.

Hi [First Name],

Last week, I emailed letting you know about our partnership with Gathered Here, Australia's most trusted provider of free online wills.

Reassure supporters that Gathered Here is a trusted brand.

If you haven't gotten around to writing yours yet, don't worry - there's still time to claim your free online will. Gathered Here has over 3,000 five-star reviews from verified will-writers, so I can assure you you're in safe hands.

Add a button, hyperlinked to your landing page.

[Write your free will today](#)

Writing a will is one of the most important things you can do for your loved ones. It can save them financial and emotional stress, it can give you peace of mind that your belongings will go to people who treasure them, and it's also an opportunity to support the causes closest to your heart.

Reiterate the importance of having a will.

Many of our supporters find that pledging a gift to charity in their will, after they have provided for their loved ones, is a powerful way to make a lasting impact to a cause they care deeply about. Even a small percentage, like 1%, can help us continue [Organisational goals] while ensuring your family are still provided for.

Normalise legacy giving and online will-writing

I know it's a big decision, but I'd like to ask if you'd consider including a gift to [Charity Name] in your will. This gift won't cost you anything during your lifetime, but could help us protect our work and [Charity activities] for generations to come.

Some charities find 1% messaging increases the number of gifts they receive. However, be wary that supporters may have pledged more than 1% if this figure wasn't initially suggested to them.

I also want to stress that you can still write your will for free via Gathered Here, regardless of whether you pledge a gift to charity or not.

However, if you do decide to include [Charity] in your will, we'd love to know so we can say thank you. A gift to our cause - no matter what size - is always received with honour.

Remind supporters that a gift is optional.

Thank you for your consideration and your ongoing support.

Encourage supporters to share their decision with you.

With warmest regards,  
CEO or GiW Manager



GiW Manager/CEO

Sign off from an individual and include a photo and signature, for a personal touch

# Email templates - Supporters

EMAIL 3 OF 3

## READY TO CREATE A LEGACY?

Hi [First Name],

Over the past couple of weeks, I've been talking to our supporters about our free online will partnership with Gathered Here, and asking them to consider pledging a gift to [Charity].

We've been blown away by the response. Being included in a supporter's will, their final wishes, is a true privilege and we are deeply grateful every time.

If you haven't gotten around to writing your will yet, don't worry - there's still time to claim your free will and put a plan in place for your loved ones.

[Write your free will today](#)

There are lots of benefits to having a will. You can save your loved ones financial and emotional stress during a time that will no doubt be extremely difficult for them. You can get peace of mind that your belongings will go to people who will treasure them. You can put guardianship plans in place for children or pets. You can make requests for your funeral, so your final farewell happens how you want it to.

Writing a will also gives you the opportunity to support causes close to your heart, if you wish. After providing for loved ones, many of our supporters find that pledging a gift to [Charity Name] is a way to create a lasting impact without feeling financial stress during their lifetime.

By pledging a gift to [Charity]. in your will, you can create a legacy of protecting [Charity Recipients], furthering [Charity Mission], and doing your bit to ensure the world is a better place.

Will you consider pledging a gift in your will and creating a legacy that lasts longer than a lifetime?

Again, thank you for your support and consideration.

With warmest regards,  
CEO or GiW Manager



GiW Manager/CEO

Create an eye-catching banner, with a positive cause-related image.

Provide context for the final message.

Normalise legacy giving.

Add a button, hyperlinked to your landing page.

Reiterate the importance of having a will.

Let supporters know they're not obligated to pledge a gift.

Sign off from an individual and include a photo and signature, for a personal touch

# Email templates - Lapsed Donors

EMAIL 1 OF 1

## A New Year message

Hi [First Name],

Happy New Year! I hope you've had a restful break, reminisced on old memories, and made some new ones with friends or family.

I have been thinking of everything [Charity] has achieved over the past 12 months - [2-3 ACHIEVEMENTS] - and I wanted to express my heartfelt gratitude for your support. Thank you.

I've also been thinking of friends and family who, sadly, are no longer with us. The memories and the legacies they leave behind, the grief when we lose someone close to us. It's why I've decided to write a will.

Having a will in place can save your loved ones emotional and financial heartache at an already-stressful time - yet only half of Australians have one. To help close the gap, we've partnered with Gathered Here to bring all of our staff and supporters easy access to a free will.

[Write your free will today](#)

This past year hasn't been easy for all Australians and charity spending is an expense that many people have had to pause for the meantime. If you've been looking for ways to support your favourite charities without incurring any financial cost, you might want to consider pledging a gift in your will.

Gifts in wills account for 25% of all charity revenue in Australia. Without them, we would never have been able to [Charity Achievements]. Pledging a gift in your will won't cost a cent during your lifetime, but it can help us protect our work for generations to come.

I want to stress that you can still claim your free online will and choose not to include [Charity]. I encourage everyone to put an estate plan in place and protect their loved ones.

Thank you for your ongoing support and consideration,



GiW Manager/CEO

Create an eye-catching banner, with a positive cause-related image.

Reiterate the importance of having a will.

Add a button, hyperlinked to your landing page.

Reiterate that the will - and gift - won't cost anything.

Sign off from an individual and include a photo and signature, for a personal touch

# Email templates – Staff and volunteers

EMAIL 1 OF 1

## A New Year message

Hi [First Name],

Happy New Year! I hope you've had a restful break, reminisced on old memories, and made some new ones with friends or family.

I have been thinking of everything [Charity] has achieved over the past 12 months - [2-3 ACHIEVEMENTS] - and I wanted to express my heartfelt gratitude for your effort throughout this year.

I've also been thinking of friends and family who, sadly, are no longer with us. The memories and the legacies they leave behind, the grief when we lose someone close to us. It's why I've decided to write a will.

Having a will in place can save your loved ones emotional and financial heartache at an already-stressful time - yet only half of Australians have one. To help close the gap, we've partnered with Gathered Here to bring all of our staff, volunteers and supporters easy access to a free will.

[Write your free will today](#)

If you choose to write your will with Gathered Here, you'll be asked if you'd like to include a gift to [Charity], or any other charity. Although we kindly ask that you consider pledging a gift, there is absolutely no expectation or obligation for you to do so.

You will still be able to write a free will, and we have no visibility over what is included in your will, unless you specifically disclose that with us.

We hope you take advantage of this offer, and put formal plans in place to help protect your loved ones, and your assets. If you do decide to include a gift to [Charity Name], I thank you for your generosity, as well as your ongoing dedication. We wouldn't be able to do it without you.

Warmest regards,



GiW Manager/CEO

Create an eye-catching banner, with a positive cause-related image.

Reiterate the importance of having a will.

Add a button, hyperlinked to your landing page.

Stress that there is no obligation to include a gift to charity, and that you won't be able to see their will, unless they share the details with you.

Sign off from an individual and include a photo and signature, for a personal touch

# Email templates – Corporate partners

EMAIL 1 OF 1

Hi [First Name],

Happy New Year! I hope you've had a wonderful break and enjoyed some well-earned time with loved ones.

As we settle into 2025, we're excited about the initiatives we have planned for [Company Name] and our wider team - including a commitment to support you in both your professional and personal well-being.

As part of that commitment, we're joining forces with [Gathered Here](#), Australia's most trusted provider of free online wills, to bring our team access to easy, affordable estate planning.

[Click here to start writing your will, for free](#)

Having a will is one of the most important ways we can provide security and peace of mind to our loved ones. You can confirm financial support for your family, ensure your belongings go to the people who will treasure them, and make formal guardianship plans for your children or pets.

Wills are a vital financial and family tool, we recommend that everyone has one and, now, you can create one for free via Gathered Here.

Writing a will is also an opportunity to support the causes closest to your heart, if you wish. When you write your will through Gathered Here, you'll be asked if you'd like to include a gift to [Charity Name], our charity partner, or any other charity you support.

While I encourage everyone to consider pledging a gift, I want to stress that this is not required in order to complete a free online will and what is included in your will is private, unless you disclose your gift to the charity of your choice.

Whatever you decide, we're committed to supporting you in making informed choices for the future, and we're here to answer any questions you may have about the process.

Kindest regards,



Manager/CEO

← Explain the importance of having a will in place.

← Stress that there is no obligation to include a gift to charity, and that you won't be able to see their will, unless they share the details with you.

# Social media templates

Social media posts help normalise and promote online will-writing among your supporter base. However, we have seen limited success with paid social media promotions, so we recommend sticking to organic posts.

Post on Facebook



📣 Looking for a free way to support [Charity Name]? 📣

Including a gift in your will is one of the most impactful ways you can support a charity, without incurring any up-front cost.

But what about the cost of a will? 🤔

Thanks to our partnership with Gathered Here, you can now write a will for free - and it's free whether you pledge a gift to charity or not.

There are heaps of benefits to having a will, including:

- 👪 Protect your family from financial and emotional stress
- 🔑 Give your belongings to people who will treasure them
- 🐾 Put guardianship plans in place for your pets
- ❤️ Give instructions on how you want your funeral

Start writing your free will today:

👉 [Link to custom landing page]



Post Now

# Social media templates

Post on Facebook



Did you know, 25% of charity revenue is from gifts in wills?

We're always honoured when supporters include us in their final wishes, alongside the people they care about most in the world. Their generosity helps us protect our work for future generations so [Charity Goal].

If you're interested in supporting [Charity Name] in your will, we've teamed up with Gathered Here so you can do it for free.

Start writing your free will today:

👉 [Link to custom landing page]

Remember, there are many benefits to having a will, beyond being able to support your favourite causes without feeling any financial impact. Including:

- 👉 Protect your family from financial and emotional stress
- 👉 Give your belongings to people who will treasure them
- 👉 Put guardianship plans in place for your pets
- 👉 Give instructions on how you want your funeral



Post Now

# Get in touch



A New Year digital bequest campaign could generate hundreds of thousands of dollars for your organisation. Even millions.

The best bit? It doesn't have to be complicated, time-consuming or expensive.

Get in touch today to find out how we can help.



Email [Lucy@GatheredHere.com.au](mailto:Lucy@GatheredHere.com.au) or [click here to book a meeting with Lucy](#).



Email [Surina@GatheredHere.com.au](mailto:Surina@GatheredHere.com.au) or [click here to book a meeting with Surina](#).



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