

Gifts in Wills Campaign Kit



Expertly crafted templates to help your organisation create and execute an effective digital bequest campaign.

Introduction

So, you're ready to approach your supporters about digital bequests? Brilliant.

Our research shows charity supporters are overwhelmingly receptive to pledging gifts in their wills, they just need a little nudge to do it.

This kit can help you make that little nudge as compelling as possible. It includes our key tips for digital bequest campaigns as well as free templates for a three-part EDM series.

Running an online gifts in wills campaign doesn't have to be complicated or time consuming. Even a simple initiative could end up attracting hundreds of thousands of dollars in pledged gifts.

Even millions.



Lucy McMorrone

Head of Partner Success
Lucy@GatheredHere.com.au
0482 096 966

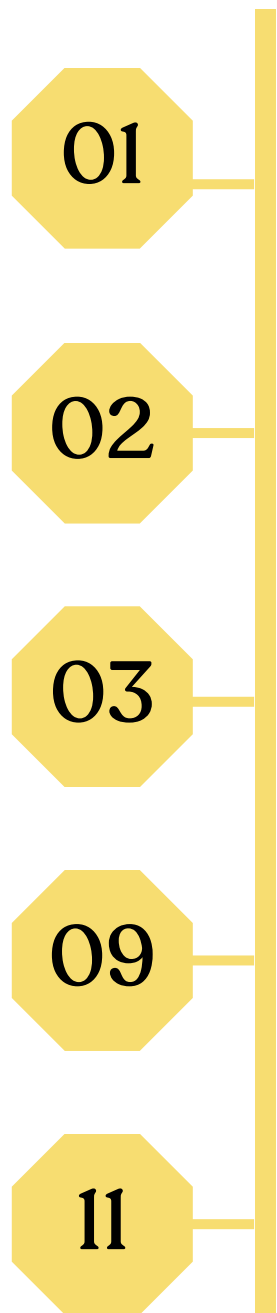


Adam Herodotus

Head of Partnerships
Adam@GatheredHere.com.au
0420 763 434



Table Of Contents



01	Campaign tips
02	Premium campaign tips
03	Email templates
09	Social media templates
11	Get in touch

Campaign tips

1

Don't be shy.



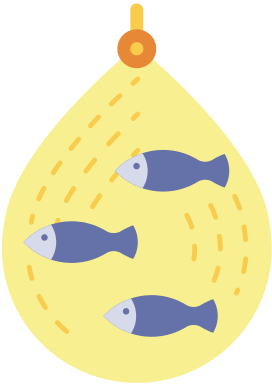
One EDM is great but a multi-part series is even better.

Our research found that a two-part EDM series delivered over one week increases the number of bequests by 110% when compared to a standalone EDM.

A third email to anyone who opened the first or second email has also been found to catch a few more supporters.

2

Cast a wide net



Reach out to as many supporters as possible. More supporters contacted means more wills written and more gifts pledged.

Plus, unlikely demographics sometimes end up being the most giving. For example, some charities have seen huge success with lapsed donors.

You might want to segment your audience and send targeted EDMs depending on their supporter demographic.

3

Use cause-related images



Avoid using images of a person writing a will, or of a will itself.

Instead, use cause-related images that suggest the impact a gift could have.

4

Add buttons



Instead of embedding hyperlinks, add buttons to your EDM or newsletter. They typically get a much higher click-through rate.

Don't just wait until the end of your email either, multiple buttons throughout the email gives means more prompts to start writing a will.

Campaign tips

Premium only

5

Create a unique tracking link

Create a unique tracking link within the Gathered Here Gifts in Wills Management Platform (GMP) so you can measure the success of your campaign.

You'll be able to see how various channels performed, such as EDMs, social posts, and website listings. You'll also be able to see donor demographics, giving trends and contact information to foster future relationships.

If you don't have access to the GMP yet, contact our partnerships team for more information.



6

Direct supporters to your custom landing page

Our research shows that charities experience a 37% increase in wills written when they direct supporters to a custom landing page.

If you haven't set yours up yet, you're missing a big opportunity.



7

Top up credits

Credits help ensure your organisation's name is front and centre when someone visits Gathered Here to write a will.

It's a great way to gain extra exposure for your charity or nonprofit, and identify potential new supporters.



Email templates

Email 1

To:

Subject: Your legacy could be greater than you've ever imagined

Preview: You can change the world in just a few minutes

Hi [Name],

Every year, thousands of Australians choose to include a gift to charity in their will.

We sometimes call this 'legacy giving' because these people are creating a long-lasting impact that can be felt for years after they've gone.

In fact, around 25% of all charity revenue comes from gifts left in wills. For [CHARITY NAME], gifts in wills help us [CHARITY MISSION].

Without them, we would have to severely scale back the work we do. Everything we have done to [CHARITY GOALS] for this generation could be lost for the next.

Thankfully, this type of giving is becoming more popular. Since 2021, online will provider Gathered Here has seen over 30,000 wills written via its platform and an estimated \$350 million pledged to worthy causes all across the country.

We're excited to partner with Gathered Here to make legacy giving as easy as possible for our supporters. Now, [CHARITY NAME] supporters can write a will for free just by clicking the button below.

[Write Your Will Today](#)

Wills written on Gathered Here are completely free of charge and include free updates for life. No matter how many times you change your mind, you can change your will too.

Importantly, if you do choose to pledge a gift to [CHARITY NAME], we will receive 100% of that gift when you die. Gathered Here never takes a cut of gifts and your hard-earned money will be used to [CHARITY MISSION].

Even if you're not ready to pledge a gift to charity, you can still use this opportunity to complete your will for free. Whether you include a gift or not, completing your will is an act of kindness to the people closest to you.

It brings them clarity in a time that will no doubt be stressful, lets your loved ones know your final wishes and ensures your assets go where you want them to.

Don't delay any longer, complete your free online will today and you could create a life-changing legacy while still looking out for the people you love.

Complete Your Will Now

Thanks for reading,



Head of Fundraising/GiW Manager/CEO

**TOP
TIPS**



**Don't forget to include
cause-related images in
your email!**



Email templates

Email 2

To:

Subject: Don't miss the opportunity to create a life-changing legacy

Preview: Claim your free online will today

Hi [Name],

We emailed you recently letting you know about our partnership with online will provider, Gathered Here. We've been humbled by the amazing response so far.

Whenever someone pledges a gift to [CHARITY NAME] in their will, we feel incredibly honoured. We understand it's difficult to think about and being included in the conversation shows us just how seriously [CAUSE] matters to our supporters.

If you haven't had a chance to write your online will yet, there's still time to get involved.

You don't have to pledge a gift to [CHARITY NAME] in order to claim the free online will, but we'd be incredibly grateful if you were able to include us.

Even a gift of just 1% of your estate could help us [TANGIBLE CHARITY GOALS], while still allowing you to make financial provisions for your family.

Claim Your Free Online Will

Thanks to the generous gifts pledged in wills, we're able to plan for the future. We can be ambitious with our goals and we can protect all of the work we've done to [CHARITY MISSION].

If you're one of the millions of Australians who are considering leaving a gift in their will, but haven't quite got around to it yet, here's your sign to do it. It'll only take around 10 minutes and if you ever change your mind, you can update your will as often as you like - for free.

Start writing your will for free!

To learn more about including a gift to [CHARITY NAME] in your will, you can contact our fundraising team directly on [INFO] or visit our website.

Thank you again for your support.

Sincerely,



CEO/GiW Manager

**TOP
TIPS**



Remember to use a unique tracking link for each email so you can see which ones have the greatest success.



Email templates

Email 3

To:

Subject: Don't miss your chance for a free online will

Preview: [Organisation Name] supporters can claim a free online will now

Hi [Name],

There's still time to claim your free online will!

Traditional wills can cost hundreds or even thousands of dollars but an online will from our trusted partner, Gathered Here, is completely free.

You can even update your will as many times as you like, for free. Make a mistake? Change your mind? No worries, just update your will in a matter of minutes.

Write Your Will Today

Why are we telling you this?

Lots of our supporters choose to pledge gifts in their wills to [Charity Name]. These generous gifts go a long way in helping us [Organisation Mission] and [Charity Mission].

But, we know traditional estate planning can be expensive and some people would prefer not to spend their money on expensive legal fees.

If you'd like to pledge a gift to [Organisation Name] in your will, you can do so for free. You won't be financially impacted in your lifetime but you'll create a legacy that will [Organisation Mission].

A gift for good

Gifts in wills are one of the most important ways we raise money here at [Organisation Name]. We're always incredibly humbled when we learn a supporter has thought of us while they're also thinking of their closest friends and relatives.

The gifts we receive help us [Current Activities]. They also help us protect the work we do so we can continue [Services] well into the future and for generations to come.

Even if you're not ready to include a gift to [Organisation Name] in your will, you can still write a will online for free through our partnership with Gathered Here.

Having a will is a kindness to those closest to you, offering certainty in a time that will no doubt be stressful for them. If you choose to include a gift to [Organisation Name] it's also a kindness to your community and a cause you care about.

Thank you for considering us at such an important time,

Sincerely,



CEO/GiW Manager

**TOP
TIPS**



We recommend sending the third email to anyone who opened at least one of the previous emails.



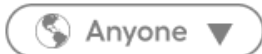
Social Posts

Emails sent directly to your supporters are by far the most effective way to generate gifts in wills, but social media posts help reinforce the messaging and keep your organisation's name front of mind.

Post on Facebook



Charity Name



This week, we're asking our supporters a pretty big question.

What will your legacy be?

Will you be remembered as a good friend? A loving parent? Someone who thought about others and cared about their community?

You don't have to be a genius or a billionaire to create a legacy. Everyone has the power to create one - including you.

By pledging a gift to [Organisation Name] in your will, you can create a legacy that lasts long after you've gone.

You could help [organisation goals and missions].

Some legacies are bigger than others, but all legacies are important. Even a gift of just 1% of your estate could help [tangible charity efforts], while still letting you provide financially for your loved ones.

If you're interested in pledging a gift to [Organisation Name], you can get started today. Write your free online will and help [long-term organisation goals] for generations to come.

Add to your post



Post on Facebook

Social Posts

Post on Facebook



Charity Name

Anyone ▼

Did you know, gifts pledged in wills account for 25% of all charity revenue?

For [Organisation Name], the gifts we receive in wills help us [charity missions]. Without them, we just wouldn't be able to do the work we do.

Sadly, traditional will-writing can cost hundreds or even thousands of dollars which makes it difficult for many people to support the causes they care about.

So, we've partnered with Gathered Here, Australia's most trusted online will provider, to offer our supporters access to a free online will.

Gathered Here has made it as easy as possible for people to include a gift to charity in their will - and it won't cost a cent.

If you're interested in pledging a gift to [Organisation Name] in your will, it only takes around 10 minutes and could help protect the work we do to [organisational work] for generations to come.

Add to your post



Post on Facebook

TOP TIPS



Don't forget to add cause-related images to your social media posts!

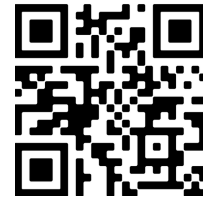


Scan the QR code to book a demo or upgrade to premium



Adam Herodotus

Head of Partnerships
Adam@GatheredHere.com.au
0420 763 434



If you're planning a campaign, let our partner success team know.
We can help!



Lucy McMorrison

Head of Partner Success
Lucy@GatheredHere.com.au
0482 096 966

