



# Legacy Futures

Together with Smee & Ford

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## Redefining stewardship in a changing legacy landscape

Public Briefing



Legacy stewardship lies at the heart of successful legacy fundraising, enabling charities to build meaningful, long-term relationships with supporters. By engaging, inspiring, and nurturing supporters, charities can guide them along the journey from **interest** to **intention** and ultimately to **action**<sup>1</sup>.

The legacy fundraising and marketing landscape is constantly evolving. New technology, new channels and shifting environments mean stewardship practices must adapt in response.

This programme explored the dynamics of legacy stewardship, how supporters feel about being stewarded, the challenges charities are facing, and the future trends likely to shape stewardship practices.

The work was supported by a ‘learning circle’ of leading 26 charities, pooling budgets, experiences and data to build evidence and insight. The programme provided consortium members with actionable insights, and collaborative learning to empower legacy fundraisers to stay ahead in a competitive environment and future-proof their strategies.

We are grateful to our learning circle members for agreeing to share the information in this briefing more widely.

## 8 Key Learnings from the Research

### 1. The landscape continues to evolve

We’ve seen a shift in landscape shaped by digital acceleration post COVID. Charities face ongoing pressure to prove the impact of legacies, while adapting to the opportunities and risks presented by digital acceleration and emerging technologies.

### 2. Stewardship is not a luxury, it’s a strategic imperative

Despite wider recognition of the value of legacy fundraising, and increased investment, fundraisers must still make a compelling case for effective stewardship. Without strong stewardship, acquisition efforts risk being wasted.

### 3. Stewardship drives long-term impact

Supporters who feel valued and connected are far more likely to fulfil their legacy pledges. We know that nearly half of UK pledgers never fulfil their intended gift<sup>2</sup>. However, research shows that being asked increases the likelihood of giving 17-fold<sup>3</sup>. Those asked and thanked gave twice as much as those who were not thanked, while ongoing stewardship can increase giving as much as three to four times compared to those who were not engaged after being thanked.

### 4. Legacy giving is a continuation of lifelong generosity

Legacy gifts often grow from enduring relationships, shared values and emotional ties to a charity’s mission. They reflect a supporter’s ongoing commitment and trust. Supporters see their legacy gift as

<sup>1</sup> **Interest** – to find out about gifts in wills; **intention** – wanting to leave a gift when they change or make their will or to be open to the idea of leaving a gift; **action** – executing/ carrying out the intention and writing a charity into the will.

<sup>2</sup> James & Baker 2015, Legacy Foresight 2019

<sup>3</sup> DameGreene 2003

part of their overall commitment, not a separate identity, and often don't feel the need or desire to be placed in a distinct 'legacy' group.

## 5. Meaningful engagement is essential

While some legacy pledgers appear satisfied with low-touch stewardship, it risks eroding connection and meaningful engagement over time. Effective stewardship should be shaped around the supporter's emotional journey, offering memorable moments, timely touchpoints, and thoughtful appreciation.

## 6. Communications must inspire trust and vision

Communications must inspire trust by showing transparency, accountability and the tangible impact of legacy gifts, linking them to a bigger mission, to build confidence, and reassure supporters that their future gift will be used wisely.

## 7. Legacy supporters value autonomy and need to see the benefit of sharing their intention

Legacy supporters want control over how they engage with charities, the freedom to change their legacy intentions without pressure. They value acknowledgements without a big fanfare or unnecessary costs, preferring a natural continuation of their support. Many supporters do not see strong benefits in telling charities about their legacy intentions.

## 8. AI and technology present both promise and barriers

Artificial intelligence and technology have the potential to enhance and personalise stewardship at scale; however, many charities lack the data, skills, and infrastructure to unlock their full potential.

## More about Legacy Foresight's consortium research programmes

Legacy Futures runs a number of consortium research programmes annually, where charities come together as a learning circle to pool their budgets, experiences and sometimes data to help build collective knowledge on different topics related to legacy and in-memory giving.

Our next consortium research programme will explore the link between brand and legacies.

To find out more please visit [www.legacyfutures.com/services/legacy-foresight/research/](http://www.legacyfutures.com/services/legacy-foresight/research/).

If you have any questions about a programmes or you would like to subscribe, please contact Claire Truswell: [claire.truswell@legacyfutures.com](mailto:claire.truswell@legacyfutures.com).