

Understanding the link between Legacy and Brand

Public Briefing

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The relationship between a charity's brand and legacy giving is complex and long-term. Do stronger brands attract more legacy gifts? How does investment in brand building influence legacy fundraising? And how can brand and legacy communications work together to strengthen long-term supporter relationships?

While charities invest significantly in building strong brands, understanding their impact on legacy giving has remained challenging. Legacy decisions are often shaped by years of trust, emotional connection and personal experience, while the time between someone writing a will and their gift being received makes it difficult to isolate the influence of brand.

This multistage research programme set out to explore this relationship: exploring how brand strength and investment relate to legacy performance, the brand attributes that matter most for legacy giving, and how brand and legacy activity work together to drive legacy income.

The work was supported by a 'learning circle' of 24 leading charities, pooling budgets to share 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.

Topline learnings

1. Brand is a strategic asset, not simply a marketing function

A charity's brand is created through every supporter experience – from fundraising and communications to stewardship and service delivery. It shapes trust, reputation and long-term supporter relationships, so building a strong brand requires commitment across the organisation. Supporters experience one charity, rather than separate brand, fundraising and legacy teams and all communications are brand communications in the eyes of supporters.

2. Strong brands create the conditions for legacy giving

Brand does not influence legacy giving through a single campaign or interaction. Instead, it builds trust, confidence and emotional connection over many years. A legacy gift can be the culmination of a long relationship made up of many positive experiences with a charity.

Consistent exposure to a charity's purpose, values and impact helps create the confidence and connections on which future legacy giving depends.

Strong legacy brands connect with supporters on an emotional level and are distinctive with clear, consistent messaging, helping supporters understand their relevance and how their legacy gift can make a real impact.

3. Positive relationships were found between brand and legacy marketing investment and legacy income

Our analysis found positive relationships between brand and legacy marketing investment and legacy income (although at this point, the analysis did not establish that income is statistically a direct consequence of spend).

Given the long timelines involved in legacy giving, sustained investment in brand needs to be seen as contributing to long-term legacy growth rather than judged solely through short-term results.

4. Trust is the cornerstone of legacy giving

Trust emerged consistently across the research as a key driver of legacy consideration and, in the data analysis, was the brand attribute most strongly associated with legacy income. Trust is multi-faceted and supporters need confidence that a charity will use their gift responsibly, deliver meaningful impact and still be there in the future to fulfil its mission. Building trust should be treated as a strategic priority.

5. Brand and legacy marketing have complementary roles

Brand activity builds awareness and understanding and can nudge people towards action, while legacy marketing prompts action but can also strengthen the wider brand. Together, they can create a valuable multiplier effect and should be treated as complementary investments rather than separate activities.

6. Strong brands will become even more important in an AI-driven world

As AI increasingly influences how people search for and consume information, charities will need to think about how their brand and legacy messages remain visible and distinctive to both a human audience and a machine. Technology creates opportunities for more personalised supporter experiences, but it should enhance rather than replace the authentic human relationships and trust that underpin legacy giving.

More about Legacy Futures 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.

To find out more please visit 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
Senior Programmes & Operations Manager
claire.truswell@legacyfutures.com

Legacy Futures

Legacy Futures, together with Smee & Ford is the UK's leading charity consultancy group that specialises in gifts in wills and in-memory giving. We provide the legacy giving data and analysis services that drive the UK market. And we are trusted partner to over 1,000 charities in the UK and worldwide, supporting them to harness the transformative power of legacy giving.

Legacy Futures

Legacy Futures is best known for research, analysis, and strategy. We work with charities large and small, UK and International, turning insight into strategy and action.

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Legacy Link

Legacy Link is the UK's largest team of estate administration consultants, helping to maximise the gifts left to a charity, and adding value at every step of the way.

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Smee&Ford

Smee & Ford provides timely and accurate legacy notification services for administration teams to optimise their services.

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