



# Legacy Monitor

Analysing the UK legacy  
market since 1994



# The UK's leading legacy and in memory insight specialists

Legacy Foresight are legacy and in memory insight specialists. Best known for our market forecasts and research projects, we work with consortiums of charities who join forces to gain greater insight into specific areas of the Legacy and In-Memory markets.

**1994**

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Helping charities better understand their legacy income since 1994

**100+**

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Working with over 100 charities in the last year

**48%**

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The charities we work with account for around half of the legacy market in terms of income



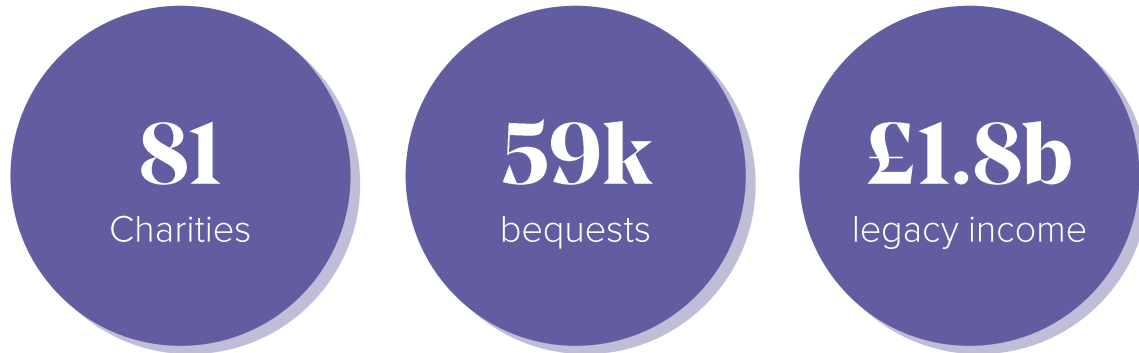
The legacy market outlook and consortium data with UK market trends, deaths and UK economic drivers collated in dedicated reports to the sector have been instrumental in our forecasting work and I have been most grateful for this information through our membership of Legacy Monitor.

**Emma Colborne**  
Head of Legacy Administration  
Blue Cross



# Understand the trends in legacy giving

Legacy Monitor is a consortium programme to benchmark, analyse and forecast trends in legacy giving. Legacy data from our members is combined with big picture economic and social trends to create an in-depth analysis of the British legacy sector. The programme covers almost half of the British legacy sector by income.



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Legacy Monitor is a unique programme for charities in the legacy market, allowing them to better understand their legacy income through robust data combined with insight and analysis from experts in the sector. This, along with the collaboration and learning across the member charities, makes it a powerful programme that informs a charity's legacy planning and strategy

**Kathryn Horsley**  
Senior Consultant - Analysis

# Shape your future legacy income forecast and fundraising strategies

## Key benefits of being part of the programme

- Access the latest legacy market trends and insights
- Understand your real-time legacy data and how it compares to your peers, your sector and the market
- Learn from your peers about their experiences and activities in the legacy space



### High quality data

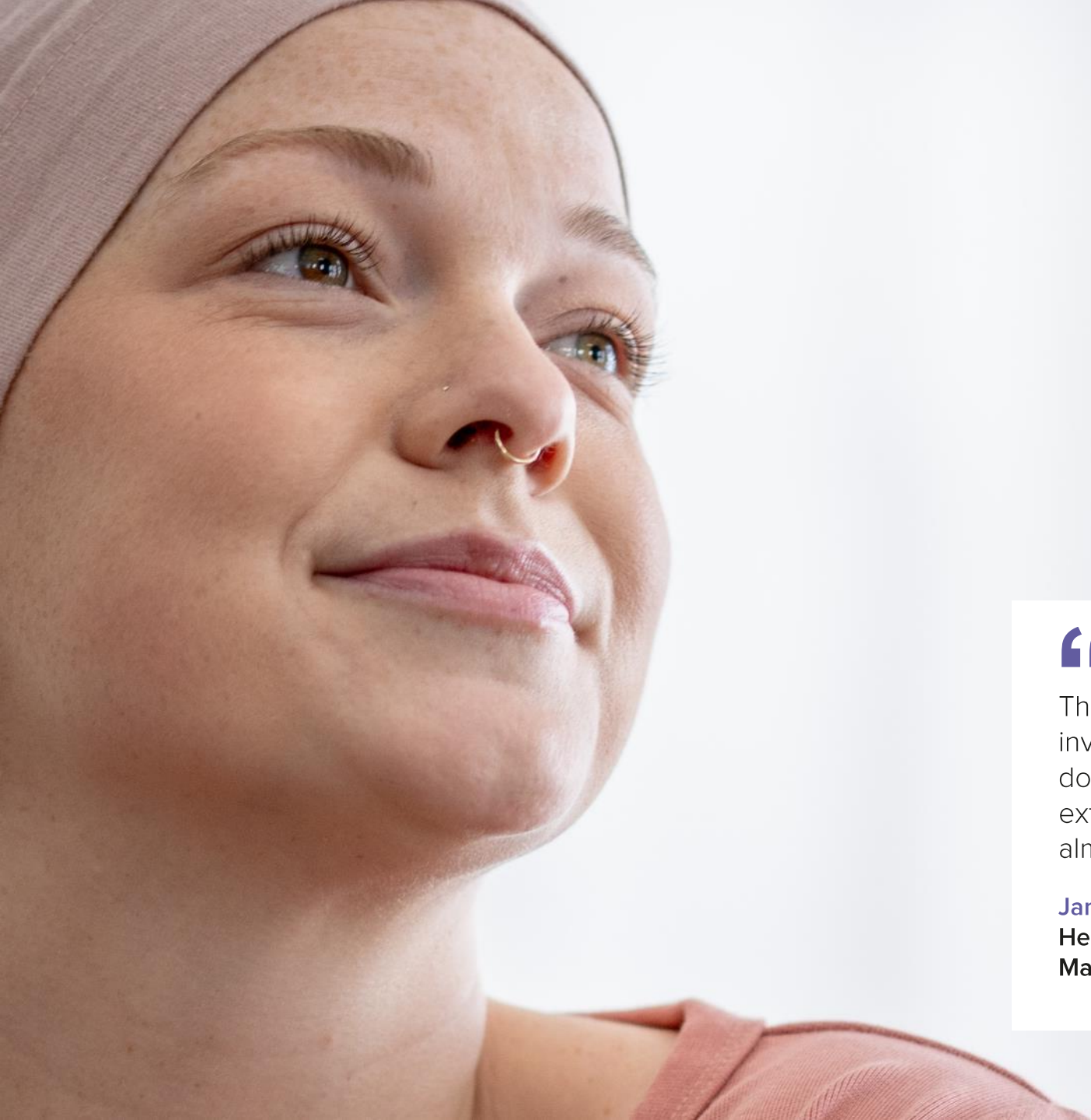
Legacy Monitor provides robust, reliable and timely data about the legacy market, so charities can understand the latest trends, and their performance relative to these

### Insight and analysis

Good data is only half of the story. The team of experts at Legacy Monitor analyses and interprets the data to identify the key trends in the drivers of the legacy market and the impact this will have on charities

### Collaboration

Legacy Monitor provides a way for charities to share and work together, which we have seen through our years of experience, benefits not only the individual charities but also the sector as a whole



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The insights we gain from being part of Legacy Monitor are invaluable. Forecasting is difficult at the best of times, but doing it without the market insights and assessment of external forces that the Foresight team provide would make it almost impossible.

**James Stebbings**  
Head of Legacy Income  
Macmillan Cancer Support

**MACMILLAN**  
CANCER SUPPORT

# Data is collected and benchmarked across a wide range of legacy metrics

## Quarterly data

- Legacy income and bequest numbers
  - Split by residual, pecuniary and other
  - Split by bequests of over £150k / £300k vs. bequests of under £150k / £300k

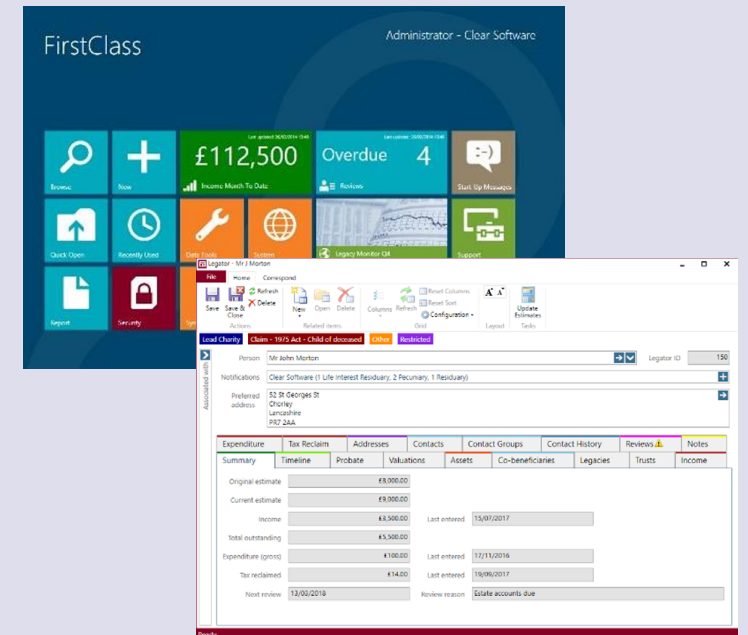
## Annual data

- Legator profiles
  - Age, gender, estate size
- Gift size and share
- Co-beneficiaries
- Time lags between last will, death, notification and income
- Restrictions
- Cases closing with no income

## In partnership with ClearCourse

The Legacy Monitor benchmark data is collected and collated for Legacy Foresight by ClearCourse, producers of the FirstClass legacy management software.

The data provision process has been designed to be as easy as possible for charities who use FirstClass and for those that don't. FirstClass is the UK's leading legacy management software. There are over 100 not-for-profit organisations using it today.



[firstclass-software.com](http://firstclass-software.com)



# Insight and analysis delivered

## Presentations and interaction

- Annual market review webinar
- Twice-yearly informal discussion groups for charity collaboration
- In-person networking event
- Access to Legacy Foresight experts to ask questions and discuss issues

## Reports

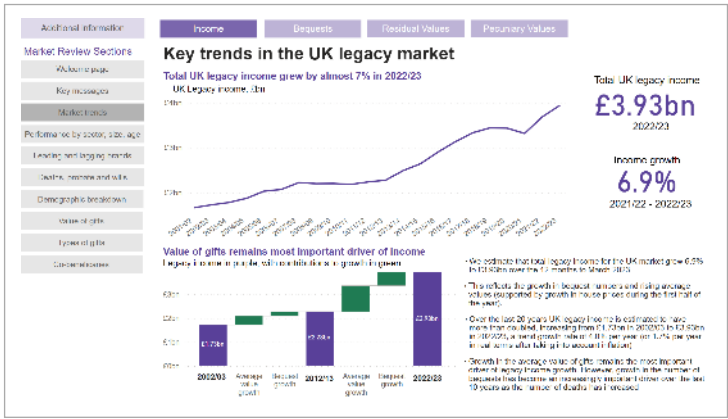
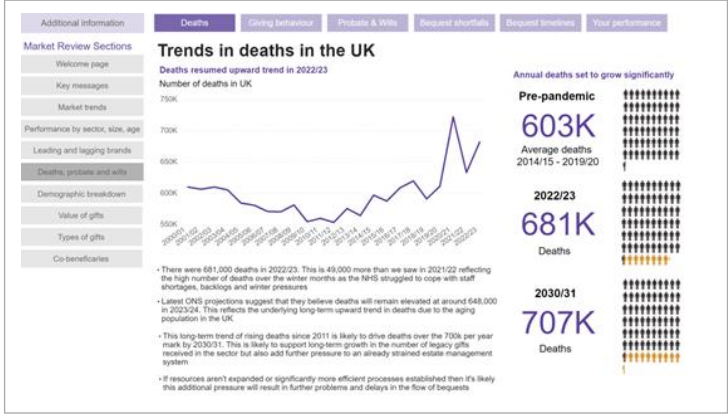
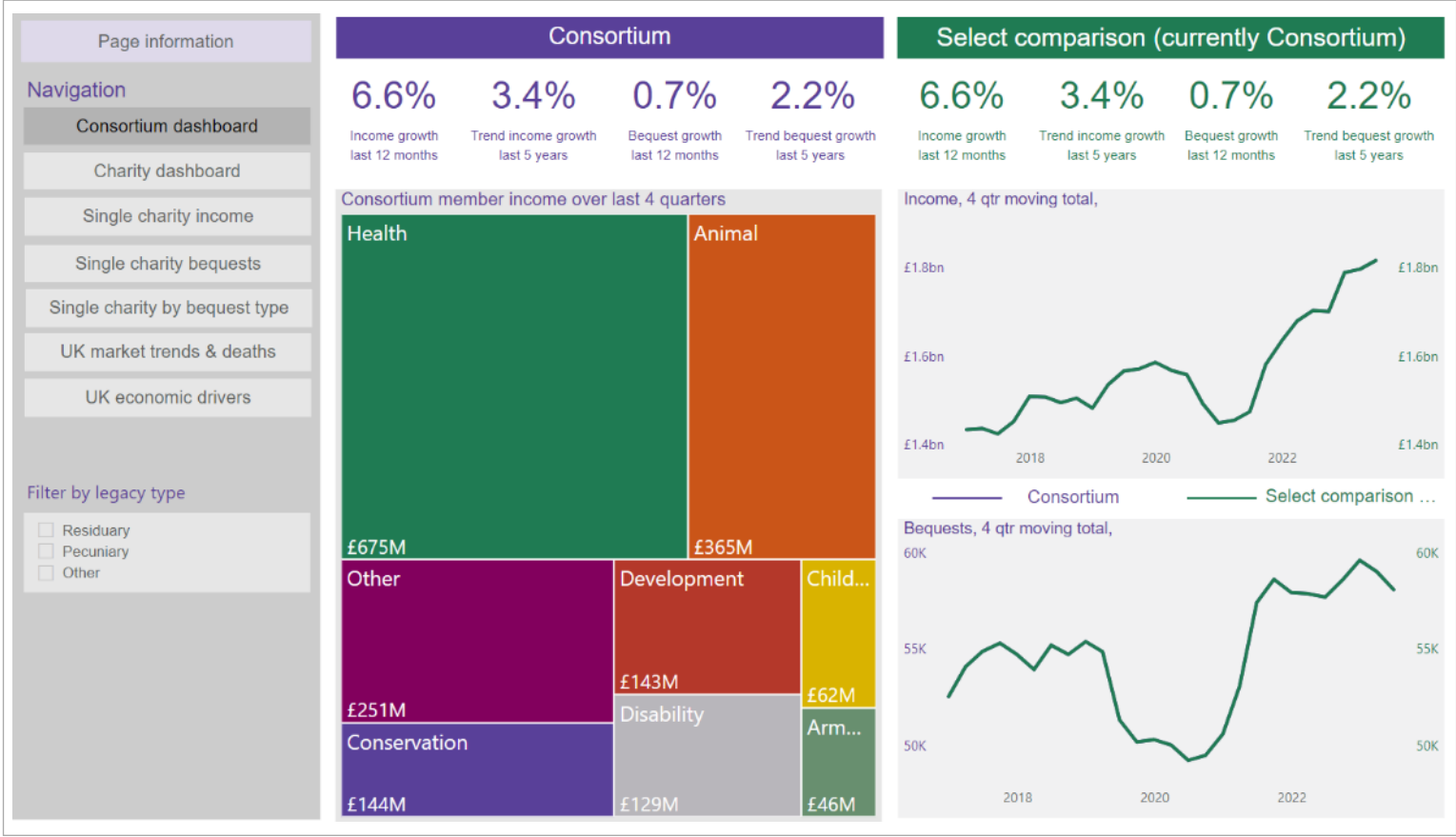
- Quarterly barometer reports summarising latest trends
- Annual market review document summarising current and future trends
- Market forecast updated twice a year

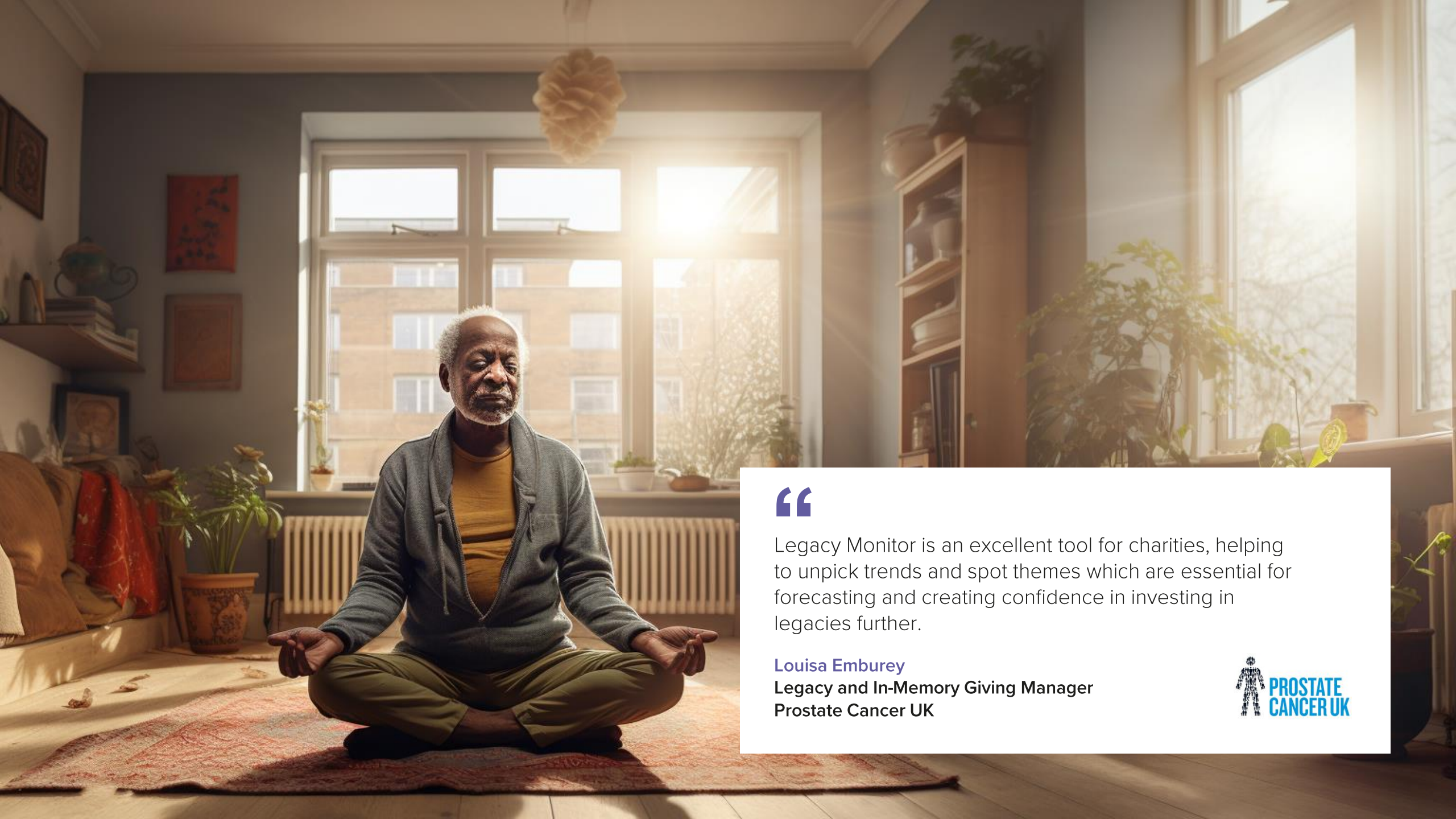
## Live data

- Access to latest data via a series of Power BI dashboards
- Ability to do your own analysis and create your own charts



# Access to the live data dashboards for the consortium





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Legacy Monitor is an excellent tool for charities, helping to unpick trends and spot themes which are essential for forecasting and creating confidence in investing in legacies further.

**Louisa Emburey**  
Legacy and In-Memory Giving Manager  
Prostate Cancer UK



# Across every sector and every size of charity

act:onaid



CAFOD  
Just one world



The  
Children's  
Society



GREENPEACE



NSPCC

Shelter



tearfund



# Our team of expert consultants is trusted by the sector



**Kathryn Horsley**  
**Director of Insight**

Kath has been working in the legacy sector since 2015, prior to which she spent 15 years as a management consultant covering a wide range of business challenges across a diverse range of industries.

Kath specialises in combining analytical rigour with excellent communication skills and has worked on a variety of legacy forecasting and strategy projects across a diverse set of charities. Kath now heads up the analysis and research parts of the Legacy Futures business.



**Jon Franklin**  
**Economics**

Jon has more than a decade's experience developing forecasts, analysing data and providing economic insight in both the government and not for profit sectors.

He has applied his analytical skills to inform high-profile policy issues for the Department for Transport, HM Revenue & Customs and the Valuation Office Agency. He is also Chief Economist for Pro Bono Economics – a charity that specialises in helping other organisations in the not-for-profit sector.



**Emma Shindler**  
**Analysis and benchmarking**

Emma has over 15 years' experience in delivering strategic insights through analysis, with 11 years at the data driven loyalty consultancy Aimia and previously client side at Marks and Spencer.

Emma works across all of our benchmarking projects and is expert at understanding how to gather robust data and present it back to members so they can visualise and interpret it.



**Caroline Waters**  
**Programme Management**

Caroline is a strategic project manager with a track record in managing successful projects and initiatives from micro to major impact.

Caroline works across analysis and research, managing our various projects and programmes. She contributes to the successful collaboration of members and is part of our Client Services team.

# Legacy Monitor operates on an annual cycle, January – December

Be part of a group of collaborative charities with the common goal of driving legacy giving.

- Quarterly market updates
- Annual market review and presentation
- Annual legacy market forecast
- Informal discussion sessions and networking event
- Access to the Legacy Monitor dashboards and charting area
- Access to legacy experts to answer your questions

Annual cost: £5,250 (2024)

New joiners: £2,625 (2024)



The legacy monitor is a valuable source of insight and information that helps us with forecasting our future legacy income. It also helps us understand what impact wider trends happening in the legacy market place will have on Brookes' future income and pipeline

**Sarah Squire**  
Legacy and In Memory Marketing Manager  
Brooke



# We're part of the Legacy Futures family

# Legacy Futures

We work with charities around the world to harness the transformative power of legacy giving. We believe it's time for a new integrated approach to legacy giving, from the first connection to the final donation. To make every legacy count and secure the future of your charity.

## Legacy Foresight

### Insight and analysis

Benchmarking, research and forecasting in the sector to inform legacy giving strategies.

## Legacy Voice

### Strategy and communications

Insight and strategy into actions to transform your legacy giving potential.

## Legacy Link

### Estate administration

Secure and grow your income with our skilled administration consultants.



# We look forward to hearing from you

If you have any questions or would like to discuss anything further, please feel free to contact Caroline Waters.



**Caroline Waters**

Head of Programmes

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