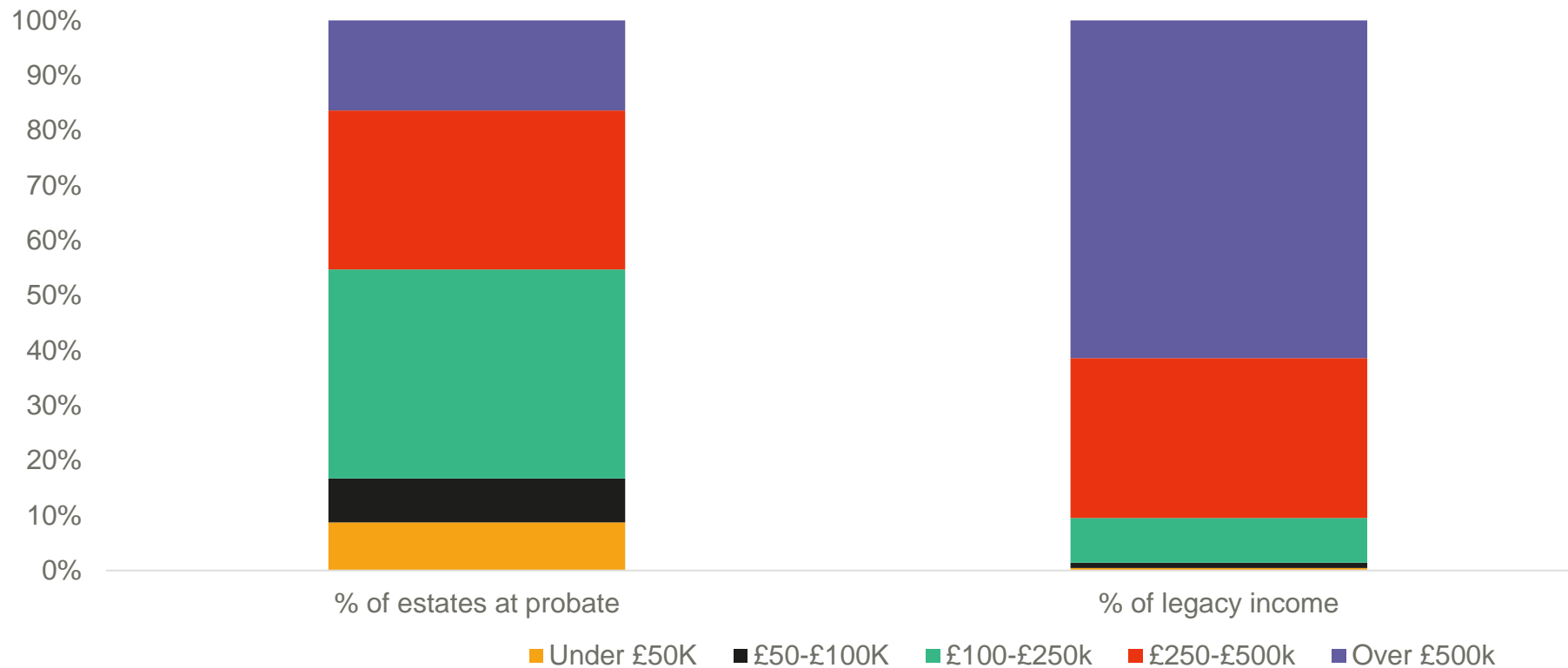


# High value legacy giving

Dr Claire Routley



# Estates of >£500k drive over 60% of legacy income



HMCTS, Legacy Foresight 21<sup>st</sup> Century Wills, Legacy Foresight analysis



£41m



THE UNIVERSITY OF  
SYDNEY



\$20m





\$500m





Who leaves these large bequests?





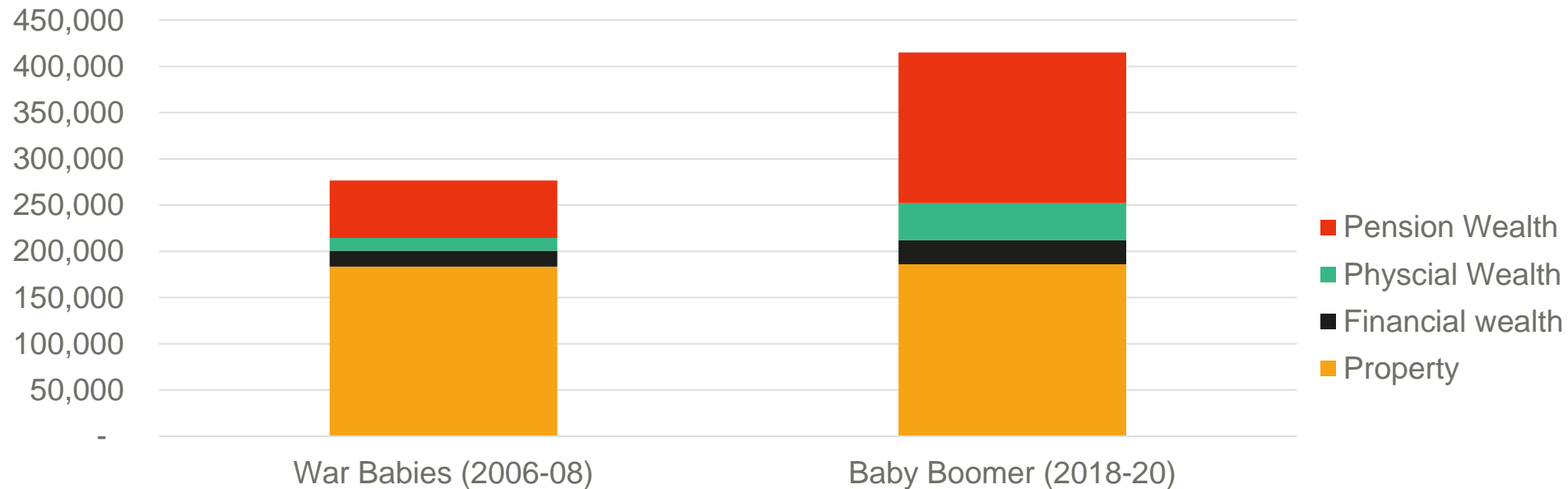
# Wealthy people...

- Are more likely to leave bequests
- Leave higher value bequests
- Leave high proportion of their estates



# Boomers more wealthy than their predecessors

Median wealth components, aged 65-69  
(adjusted for inflation)



Office for National Statistics, Social Survey Division. (2023). *Wealth and Assets Survey, Waves 1-5 and Rounds 5-7, 2006-2020. 17th Edition*. UK Data Service. SN: 7215, [DOI: 10.5255/UKDA-SN-7215-17](https://doi.org/10.5255/UKDA-SN-7215-17)





One in five baby boomers are now millionaires after their wealth nearly doubled in a decade that made younger workers just 9% better-off



# Polarisation of wealth more acute for Gen X

Amongst Baby Boomers the  
top quarter of households own

65%

of the wealth

Amongst Gen-X the top  
quarter of households own

70%

of the wealth





So what can and should you do to  
drive high value giving?

# The trade off between volume and value?

Legacy  
Futures





# Not – inadvertently – push down value?

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Did you know you can write your Will for FREE? Request our guide to learn more...

While you may have a special interest in a particular aspect of our work, or a favourite most supporters recognise that leaving an unrestricted gift for general purposes will have the greatest effect. Unrestricted gifts are incredibly important as it gives us the flexibility to direct funds where the need is greatest at the time. Not all of our future needs can be envisaged today as priorities and work may change over time.

Sponsored

[Free Will Writing Service](#)

Write Or Update Your Will With [Free Will Writing Service](#). Find Out More About Leaving The RNLIA Gift In Your Will With Our [Free Gift In Wills Guide](#). [Free Wills Service](#).

**What if I want to include a gift to a particular area of work?**

With the nature of gifts in Wills it can be hard to know exactly which of our services will be delivering this work in the future. However if you have something you would really like to support with your gift, then please do get in contact so we can advise you on the best wording for your Will.

No matter how small the gift, your legacy can live on for generations

We are extremely grateful for every legacy left to us, whether big or small, enabling us to offer more support to [RNLIA](#). Even leaving a legacy gift of just 1% of your estate can, and will, make a very real difference.

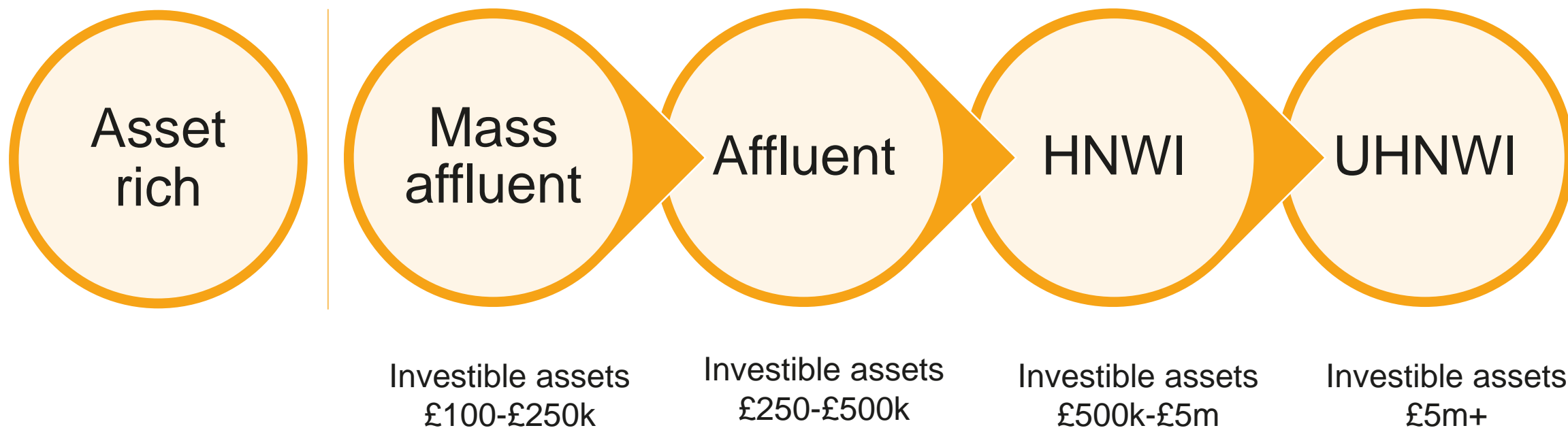


Five simple things we can do





# 1. Understand the different audiences



NB: Definitions are flexible!



## 2. Create appropriate propositions

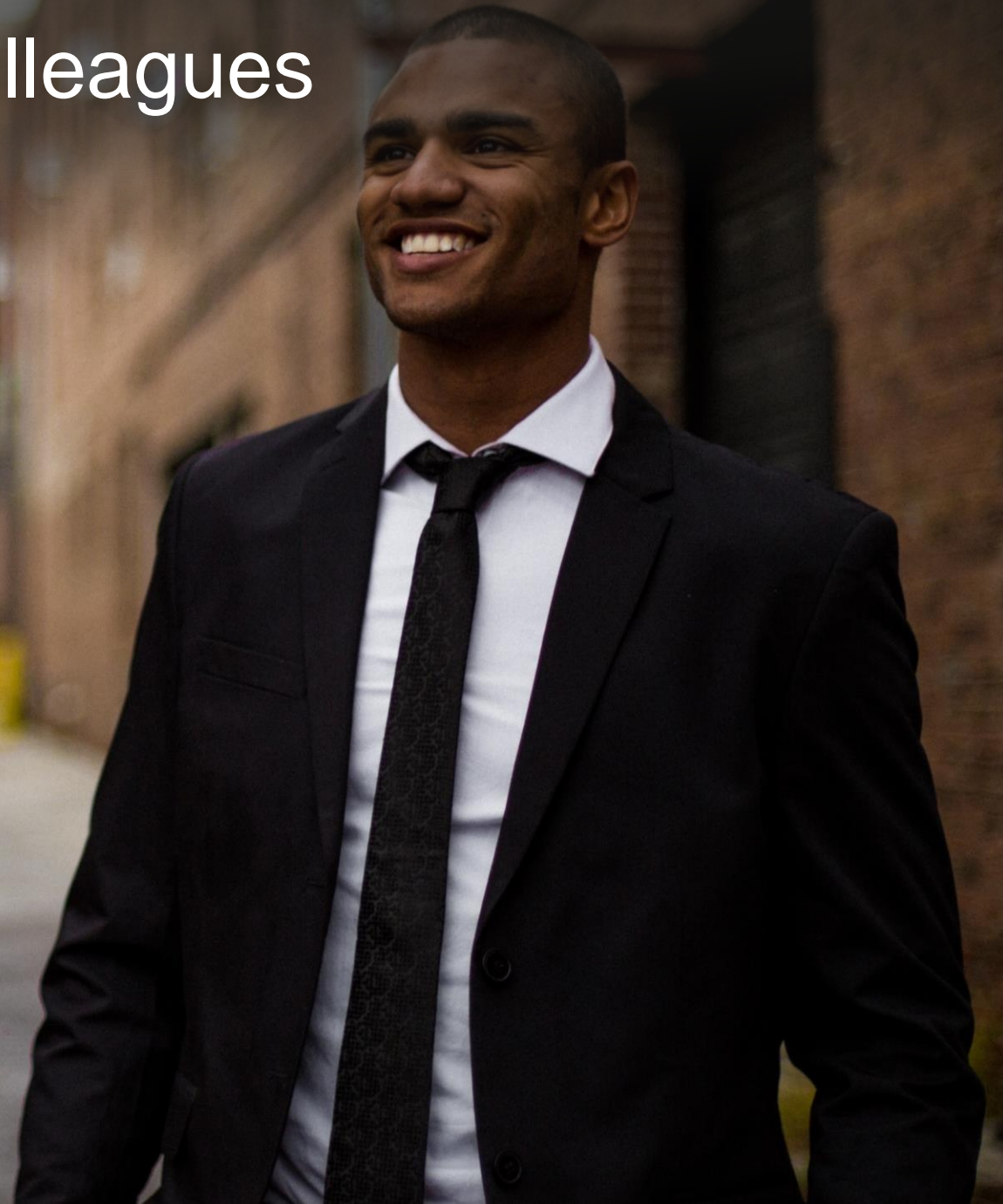
TOGETHER  
WE WILL  
CHANGE THE  
WORLD



### 3. Develop differentiated stewardship



## 4. Work with major donor colleagues





## 5. Explore blended giving

