network for joint campaigns creating a favourable environment for legacy giving to charities



#### Together we can achieve what no charity can achieve on its one: **making legacy giving a social norm**





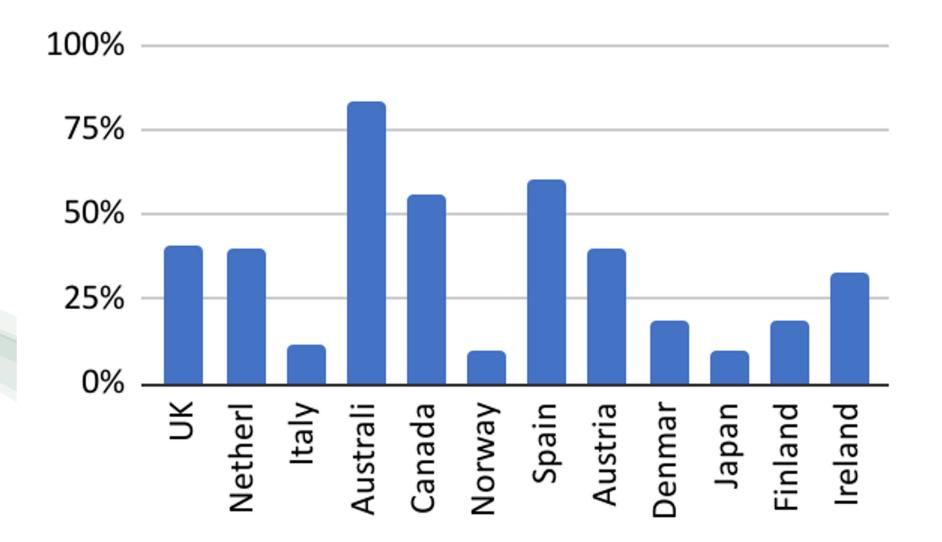
#### Growing investment in legacies



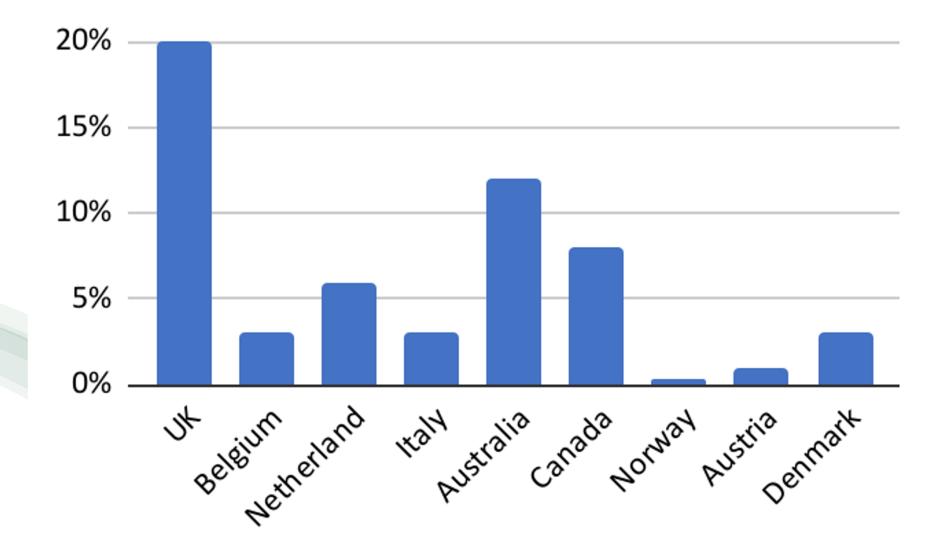
#### Difference campaigns based on different markets



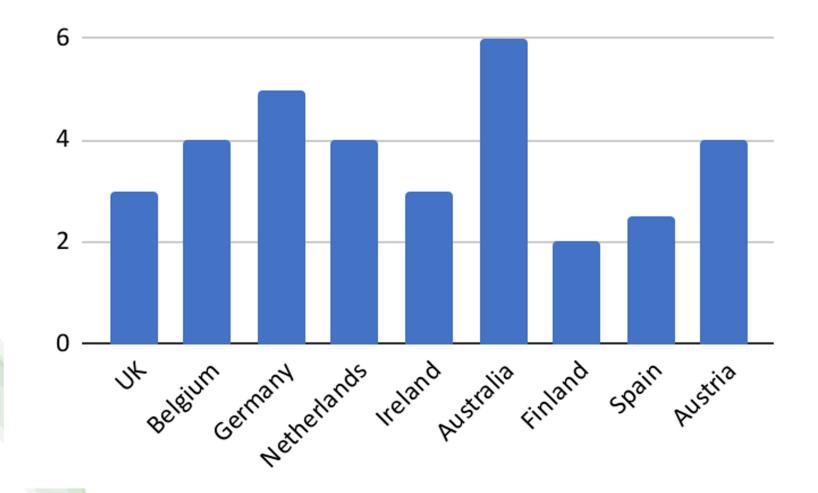
## Percentage of people that have a will



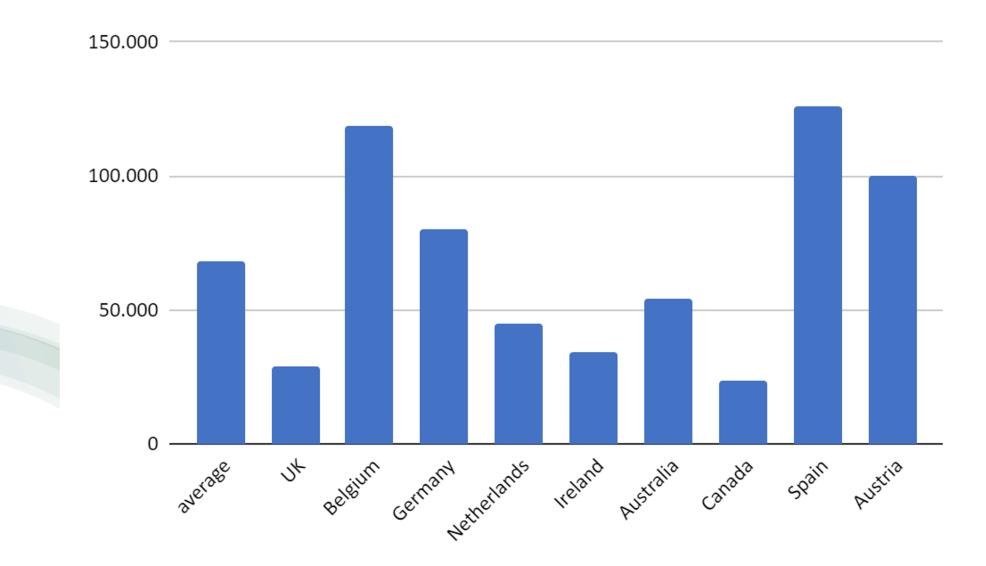
## Percentage of people who say they have a charity in their will



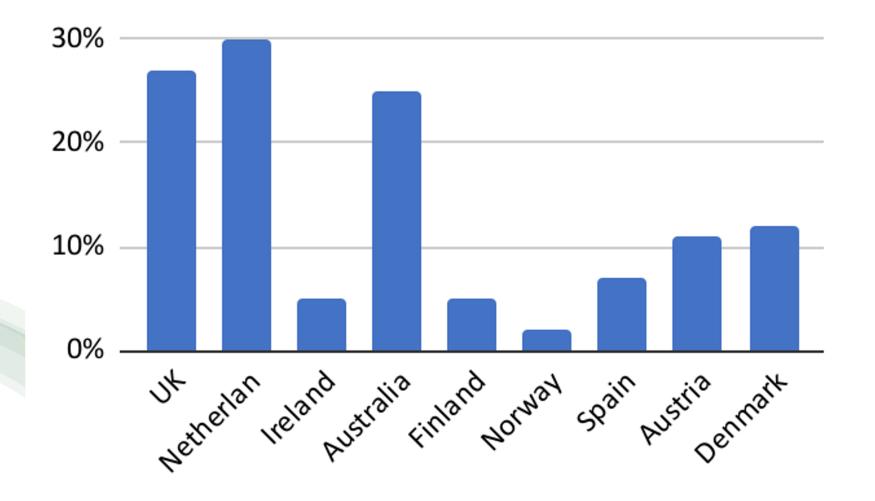
#### If will includes charity: average number of charities in will



#### Average bequest value to charity



#### Legacy fundraising income as % of private fundraising



Work together with partners like:

- government
- legal advisors
- (digital) will-writers
- financial advisors
- wealth managers
- national council of notaries/lawyers/solicitors

- estate management
- corporate partners
- funeral institutes
- researchers

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550 member charitiesTarget group: 35-7585% digital campaign

Canada's campaign increased charity-inclusive wills from 5% to 8% in only 3 years.







#### REMEMBER A CHARITY IN YOUR WILL Help the work live on...

200 member charities Target group: 55+ Remember a charity week

Increase in the number of people who include a charitable gift in their Will: from 14% in 2013 to 20% in 2022

#### Be remembered for even more than 'the birthday cake incident'.







### TESTAMENT.BE

150 member charities Target group: 55+ Leadgeneration

After 13 years they saw a doubling of charitable gifts in wills





#### De fictieve massa samenstellen om reserve en beschikbaar de berekenen

Om de reserve en het beschikbaar deel te berekenen, moet men de zogenaamde fictieve massa van de nalatenschap samenstellen. Dit gebeurt als volgt: 1. Men neemt de opederen die de overliedene op datum van zijn overliede.

 Men neems de goederen de de oversederie op datum van zijn oversjoer bezat volgens hun waarde op die datum.
Van de totale waarde van alle goederen trekt men de schulden af die de

overbednichtett rageweisen De goederen die de overliedene tijdens zijn leven heeft weggeschonke ongeacht wanneer, worden fictief hieraan toegevoegd alle schenking van de overledene tijdens zijn leven (behalve gebruikelijke schenking zoals huweitkingedeus en werinaerteeneerhenken)

 goederen die buten erfoleet zijn geschonken;
goederen die als voorschort op een erfoleet aan een erfgenaam worde geschonken en die deze erfgenaam moet inbrengen;
waardering van die schenkingen gebeurdte volgenis die oude regelis op het disby van het overlijken. In het nieuwe erfrecht gebeurt dat op basis van di

trinsieke waarde van de geschonken goederen op de dag van de schenk eindexeerd vanaf deze dag tot op de dag van het overlijden.

Op basis van deze berekening worden het beschikbaar deel en de reservastgelegd.







45 member charities Target group: 45+ Conversation starters

After 5 years an increase in 51% of legacy income





24 campaigns 1.484 charities worldwide 103.900.000 people reached

Making legacy giving to charities a social norm OCEAN



INDIAN

PACIFIC

OCEAN



## Questions?

## Thank you!



## **LEGAVISION** A World of Legacies

More information <u>www.legacygiving.eu/legavision</u> info@legacygiving.eu

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