



# COMMUNITY WILLS **SUSSEX**

Supporting local causes  
in life and beyond.

# AGENDA

1. Scheme Overview
  - a) Scope and Reach
  - b) Legacy Gifts
  - c) Confidentiality, GDPR and Privacy
  - d) How will it all work?
2. Key Dates and Communications Plan
3. Glossary



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## SCHEME OVERVIEW

Community Wills Sussex is a brand new initiative launched by you, our 4 leading, Sussex-based charities in collaboration with Britton and Time Solicitors.

Our aim through the scheme is to focus on 'brand Sussex' in promoting your local charitable causes across Sussex and offering an easy way for supporters old and new to learn more about what each of you do, and to choose how they would like to support you in life and beyond.

# COMMUNITY WILLS SUSSEX

### Proposed Logo

Our logo represents a united East and West Sussex, with our combined rich heritage from the natural beauty of the South Downs and our burgeoning wine industry, to quintessentially traditional British villages like Bolney and Rye.



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# SCHEME OVERVIEW

## Scope and Reach

Community Wills Sussex is open to any residents **in and around Sussex** who are **aged 55 or over** and who would like to leave a legacy gift to **one or more** of our 4 founding charity partners.

Clients of the scheme will be entitled to a **free simple will**, with more complex wills offered at a **reduced rate**.

Wills are funded by a payment of **£80** split across **each named** partner charity in a will, with testators required to leave a **minimum pecuniary gift of £150**.

There are no mandatory upfront donations.

## Planned launch and partner locations



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# SCHEME OVERVIEW

## Legacy Gifts

Gifts in wills are currently at an all time high:

**16%**

of all people who made a will in 2021 left a gift to charity

**£3.2bn**

the total predicted value of legacy gifts in the UK in 2022 (forecast to be £5bn by 2030)

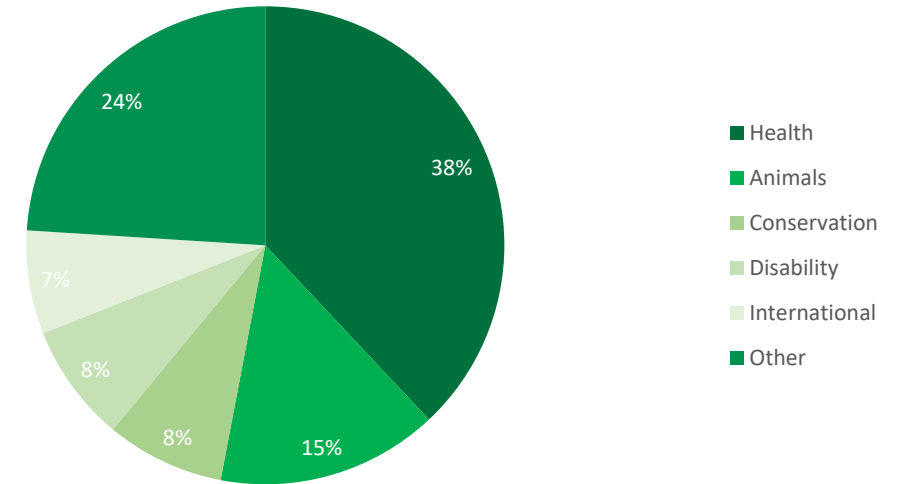
**3.3**

The average number of gifts left to charity in wills containing legacy gifts

**£3,400**

The average pecuniary (cash) gift size left to charities in 2020. Residuary gifts averaged £50,400

## Share of Total UK Legacies by Charity Type



The average UK charity derives 6% of total income from legacies.

The top 1,000 charities receive over 77% of all legacies at an average of 13% of their total income.

This means there is a **huge** opportunity for local charities to benefit from legacy gifts.



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# SCHEME OVERVIEW

## Confidentiality, GDPR and Privacy

Confidentiality is of utmost importance to us.

We require all participating partners to agree to the following terms:

1. We will never ask for a list of, nor request the sharing of information related to donors or benefactors from charity partners, except where requested by a charity partner, nor will we share these details ourselves
2. All donors are required to sign a declaration form enabling us to pass their contact details and details of their legacies to their chosen charities
3. All charity partners must offer the option for donors to unsubscribe from communications at any time
4. All donors will be provided with transparent information on how their will is funded, how it and their personal information is stored and how their information is shared



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# SCHEME OVERVIEW

## How will it all work?

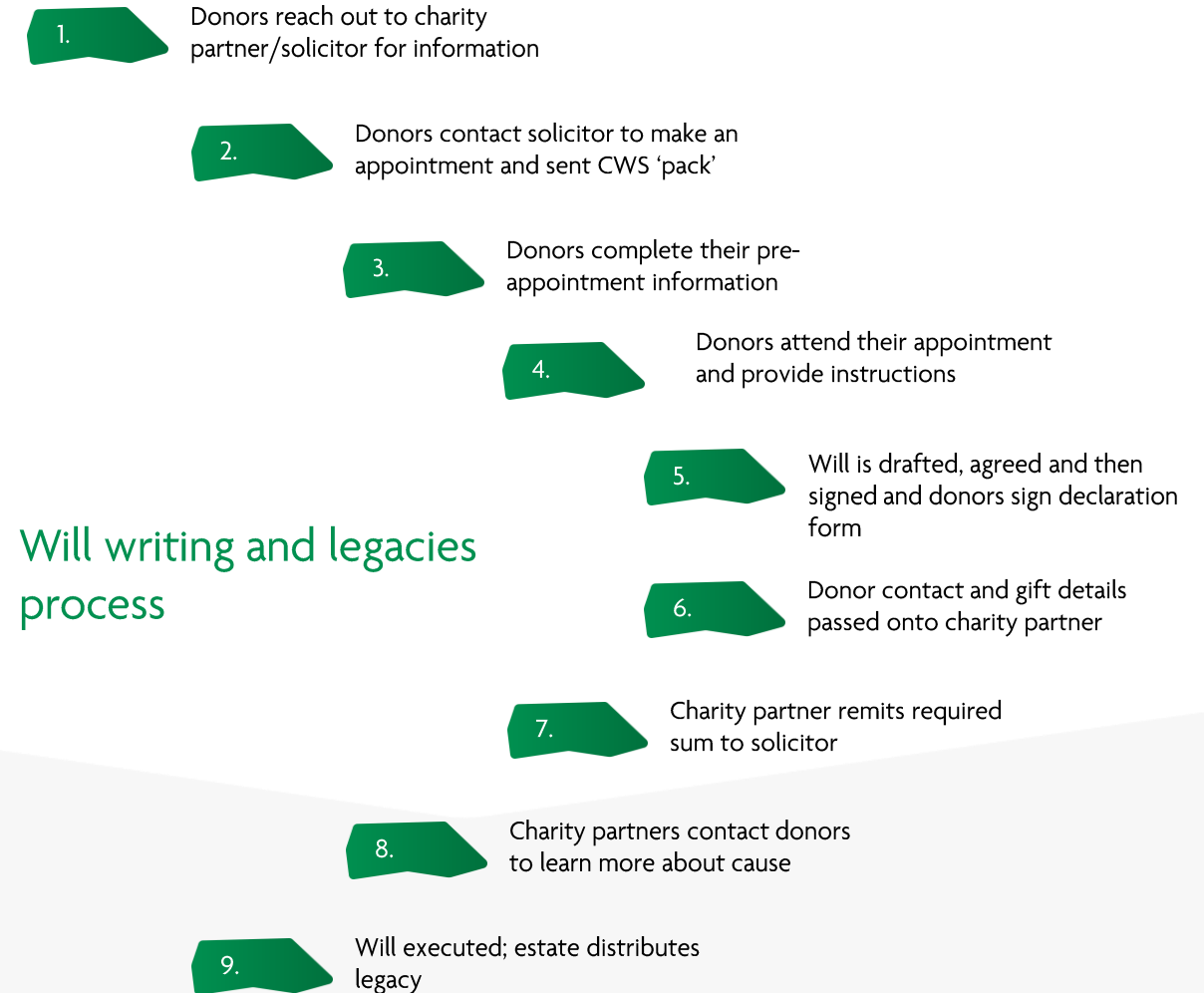
Please see the questions below:

### **Are all wills free?**

'Simple' wills are free; 'complex' wills available at a discounted rate (around 60% of all wills are 'simple').

### **Do charity partners pay a fee?**

Each will completed will attract a fee of £80 spread across all named charity partners in a will, regardless of complexity.



## Will writing and legacies process



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# SCHEME OVERVIEW

## How will it all work? (continued)

### ***Will charity partners gain donor information?***

Yes, it will be a requirement for donors to consent to contact and gift details being passed onto each named charity partner in their will.

### ***What about changes to existing wills?***

We can make changes to existing wills (make a codicil) at a fee of £50, however normally it is better for clients to produce a completely new will. If this is the case, the £80 fee would apply.

### ***Do charity partners need to contribute any funds to the scheme?***

Only the £80 will fee. All costs associated with promoting the scheme will be covered by the legal partner. We do ask however that charity partners promote the scheme on social channels and in any newsletters/collateral at the relevant time, and promote any legacy programmes they have at the time.

### ***Will we receive copies of donor wills?***

No, we can only share details of legacies and contact details as this would otherwise breach our duties of confidentiality.

### ***Can existing donors take part?***

Managing who can and cannot get a will is going to be a complex affair, therefore we suggest leaving the scheme open to anyone eligible.



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# SCHEME OVERVIEW

## How will it all work? (continued)

### ***Who is eligible?***

This is up for discussion, however we would suggest limiting the scheme to individuals over the age of 55.

### ***When do charity partners receive payments?***

When donors pass away and the estate is settled. We expect this to be an average of around 25 years if we apply eligibility criteria.

### ***Will charity partners benefit from any upfront gifts?***

Not directly through each will. We will ask donors to each make a minimum pecuniary gift of £150, which will be received when the estate is settled. Outside of this gift, we will pass contact details on to encourage lifetime giving.

### ***Can we market home visits?***

This would not be part of the standard service and home visits would attract a fee.

### ***Will donors be able to take advantage of the scheme remotely?***

Yes, but only if they are able to use Zoom or Teams. For security reasons and to rule out undue influence, a face-to-face meeting is best.



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# SCHEME OVERVIEW

## How will it all work? (continued)

### ***Do donors have to name a charity partner?***

Yes, this will be a requirement of the scheme. If donors choose to name additional charities outside of the scheme, we cannot stop them from doing so, and any fee chargeable would still apply solely to the named charity partner(s).

### ***Will more charities join later?***

We hope so, however we will limit the initial launch of CWS to our 4 founding partners. Any future partners will be discussed prior to joining and will need to be Sussex-based.

### ***Where does the £80 fee go?***

£30 from the fee for each will is spent registering a will on the National Will Register, minimising the chance that the will cannot be found by the executor(s). The remaining £50 covers a part of the labour cost to produce the will.

### ***How many will writing places are available?***

This is subject to agreement, but we would propose between 10 to 20 places for the initial launch. We can always add more places if it makes sense to do so. A couple making joint wills would take up a single place.

### ***Can people from outside Sussex take part?***

As long as donors are leaving gifts to a named charity, we see no reason to exclude people from outside of Sussex.



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# KEY DATES COMMS PLAN

## Agreement

Scheme is signed off by all parties.

## Announcement

All parties to announce participation in CWS and release details of the scheme, including launch date

## Booking window opens

Donors can begin booking appointments from mid-April for May.

Any dates we ought to be aware of?

F W M

M A R T L E T S

D E C E M B E R

J A N U A R Y

F E B R U A R Y

M A R C H

A P R I L

M A Y

## Planning

Relevant documentation is produced in preparation for scheme launch.

## Marketing

B&T to push messaging out across multiple channels at end of Mar (cross promotion)

## Launch!

Donor appointments will start from 1 May.



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# GLOSSARY

**Charity partner**

Any participating charity involved in Community Wills Sussex.

**Solicitors**

For the purposes of this presentation, solicitors refers to Britton and Time Solicitors.

**Legacy**

A gift left by a donor in a will

**Gift**

Any cash or items left in a will

**Pecuniary gift**

A cash gift or defined sum of money left in a will.

**Specific gift**

A defined item or portion of an asset left as a gift in a will, e.g. 10% of the value of a specific property.

**Residual Gift**

A gift made up of everything left over in a person's estate. These can be sizeable.

**Donor**

A person who creates a will using the scheme and/or a supporter of a charity partner.

**Testator**

The person making a will.

**Executor**

The person or people responsible for settling a testator's estate upon death.

**Estate**

Everything that a testator owns or has an interest in.



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# GLOSSARY

## ***Simple will***

Varies, but primarily a will that covers an estate which will likely not be liable for inheritance tax, and which is wholly based in England and Wales.

## ***Complex will***

A will that relates to larger or more complicated estates, for example where specific drafting is needed for trusts and/or estates which contain international assets, excluding business assets.

## ***Settling an estate***

The act of applying for a grant of probate and ensuring all debts are paid from an estate and beneficiaries receive their gifts.

## ***Beneficiaries***

The people or entities (including charity partners) who benefit from an individual's estate

## ***Declaration form***

The form donors are required to sign to take part in Community Wills Sussex



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