

Legacy Giving & Will Writing

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Editable Resources For Your Parish

Editable Stewardship Resources



Card Readers & Parish Giving Scheme





**Why are we talking about Will
Writing and legacy Giving**

Because...

**I can make a real difference to
the parish and the donor.**

Question 1

- What is the average UK age to write your will?

- Answer

• 58



Question 2

- Who is more likely to write a will, men or women?
- Answer
- Men



Question 3

- What percentage of uk adults have a will?
- Answer
- 44% - Have a will...



Question 4

- What percentage of Anglicans have been asked to leave a legacy to their church?
- Answer
- Only 15% of Anglicans have been asked to support their church by leaving a legacy.



Why is having a Will important?

- Having a Will is important because:
 - Ensures your assets are distributed as you wish
 - Can appoint guardians for children
 - Minimises the stress of family disputes
 - Allows for effective estate tax planning
 - Provides you with peace of mind
 - Enables you to make charitable gifts

The Importance of Will Writing and Legacy Giving.

- Our aim is to promote will writing more widely throughout the diocese to help as a form of income generation for parishes but more importantly to offer an important service to our church communities.
- The church should aim should be to open discussions about what happens when we die...
- Encourage will writing
- And to promote the impact receiving a legacy may have on the church.
- You should **not** influence people as to what they directly put in their will...

Legacy Giving Information

- Each year approximately 5,000 people leave a gift in their wills to a Church of England parish. This amounts to around £60 million in legacy gifts each year.

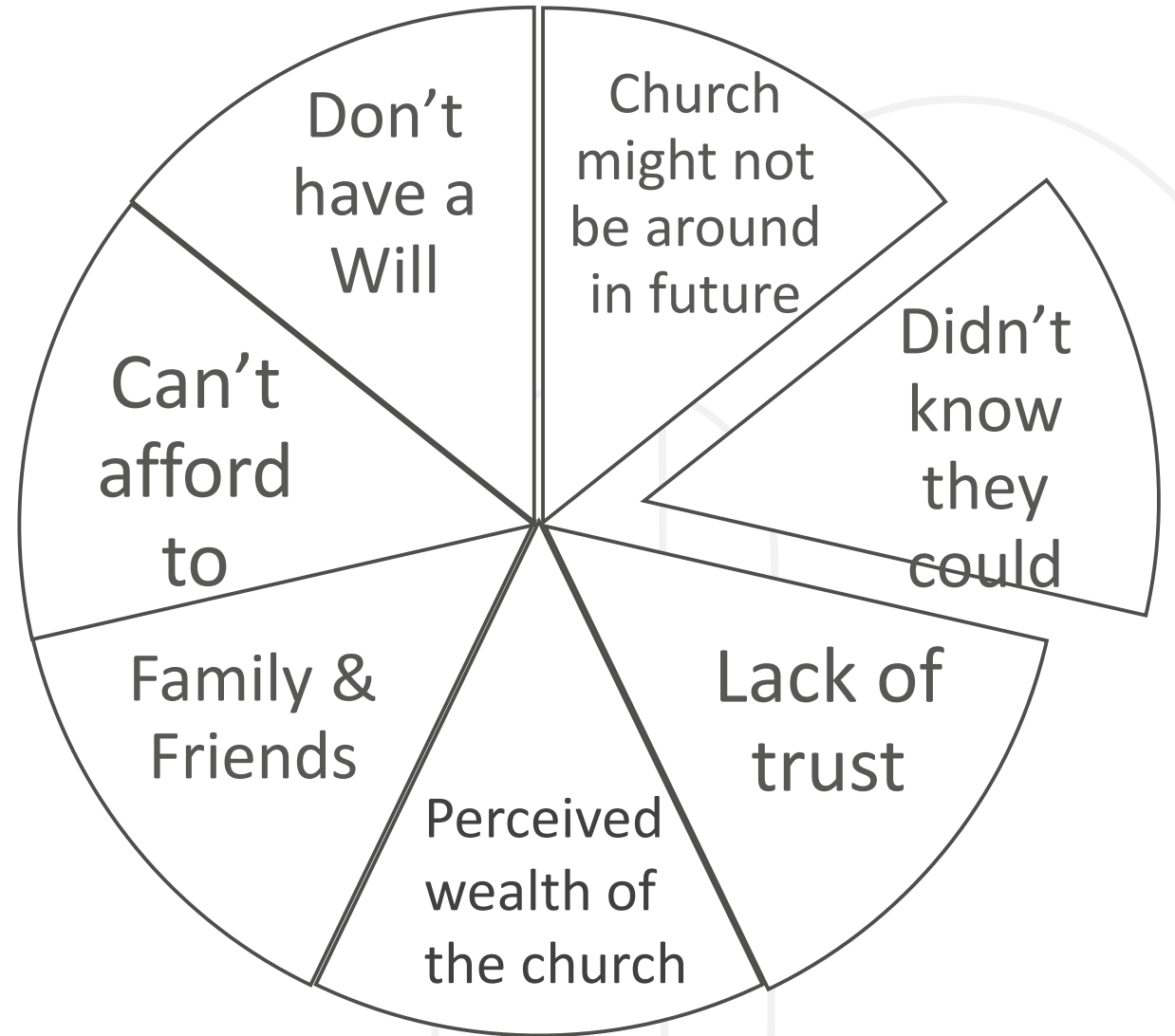
However

- Anglicans are three times as likely to leave a legacy to charity rather than the church they are apart of.

From the Anglican Giving Survey.



Common reasons for not leaving a legacy:



The Importance of Will writing and Legacy Giving.

For the individual...

- Life Affirming
- Part of Christian Giving
- Planning for the future
- An opportunity to take care of those we love.
- An opportunity leave a lasting gift.

The Importance of Will writing and Legacy Giving.

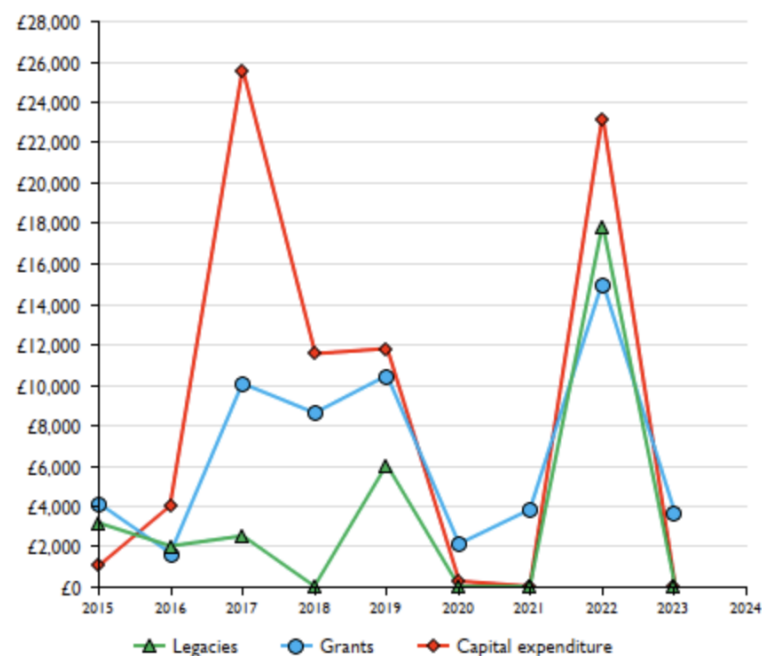
For the Parish...

- A source of income
- Over and above planned income
- Can release new ministry opportunities
- All gifts no matter the size can make a difference.
- Celebrating legacy gifts builds a culture of generosity within your parish.

What I would love to see for your churches

Parish Finance Return Example

6. Legacies, Grants and Capital expenditure



| | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 * |
|---------------------|--------|--------|---------|---------|---------|--------|--------|---------|--------|--------|
| Legacies | £3,136 | £2,000 | £2,501 | £0 | £6,000 | £0 | £0 | £17,757 | £2 | - |
| Grants | £4,110 | £1,636 | £10,035 | £8,588 | £10,431 | £2,100 | £3,820 | £14,974 | £3,617 | - |
| Capital expenditure | £1,024 | £4,014 | £25,469 | £11,515 | £11,770 | £261 | £0 | £23,069 | £0 | - |

* N.B. Data entry for is not yet complete for this Parish. As a result these figures may not be comparable to earlier years.

Unrestricted and Restricted amounts have been combined.

Leaving a legacy to the Church of England

- The proper receiving body in this case is the Parochial Church Council (PCC) of the parish. These are the preferred recipient.
- All PCC's are charities therefore exempt for Inheritance Tax

Example:

"I give _____ % of my residuary estate or I give the sum of £ _____ (pounds) free of all taxes to the Parochial Church Council of the parish of _____ (registered charity number if applicable _____) in the Diocese of _____ for its general purposes, and I declare that the receipt of an officer of the Parochial Church Council shall be a sufficient discharge to my executors and trustees."

Gifts for General Purposes

- Restricted gifts can be difficult to deal with.
- Since circumstances change over the years, church members are encouraged to leave gifts in their Wills for the general purposes of their parish.
- If you wish to restrict your gift, for example 'to repair the church tower', it cannot be used for any other purpose. It is most helpful if the restriction is kept reasonably open, for example 'for general maintenance of the building.'

Legacy Policy Template

- Simple 1 Page Document
- Template available to download
- To start the conversation
- To point and encourage to the will to be used in a useful and meaningful way.
- [Download the Legacy Policy Template](#)

Example Legacy Policy

At St Agatha's, we welcome all gifts in wills, however large or small and we promise to use your gift to make a difference to our parish. Our PCC Legacy Policy is to use gifts to help fund significant development projects, whether buildings, equipment or staff.

Since needs change over the years, we encourage you to leave a gift in your will for the general purposes of the parish rather than for a restricted purpose. We will discuss possible uses of your gift with your executors when the time comes, bearing in mind your known areas of interest in the church (e.g. music, buildings, children and youth, overseas mission or aid) and the church's priorities at the time.

You can be confident that your gift will be used to make a real difference to our future mission and ministry.

We acknowledge gifts in whatever way the donor and/or his/her executors feel most appropriate to. Equally, we can make sure that gifts remain anonymous if the donor prefers.

If you would like to talk to someone in confidence about the sorts of purposes your gift might fund, and how/if you would like your gift to be acknowledged, please contact Jenny Price our Churchwarden on 01686 453 289 or email jenny.price@parishchurch.org

If you would like to make a gift to our church in memoriam, please come and discuss this with us too. It can be a wonderful and appropriate way to remember a loved one.

PTO for an example Legacy Policy Template

Legacy information for the parish

- Promoting legacy giving is about having a drip-fed approach.

Mentioning publicly throughout the year and having material available.

- Have a PCC legacy policy in place.
- Use and promote the Free Will writing providers.



Diocesan Free Wills Scheme

- The 2022 Free Wills Winchester pilot.
- We have two partner providers offering **FREE WILL WRITING SERVICES** to people in the diocese of Winchester – Farewill and Batt Broadbent
- All wills are available on a first come first serve basis.



Farewill Video



Jim Findlay Priest in Charge



- The UK based online will writing company.
- Write your will within as little as 30 minutes.
- Aimed at those with a 'simple' estate.
- National Church of England partner



- Local solicitor and Diocesan Registrar
- One to one personal service
- Able to offer bespoke advice
- Years of practical experience
- Diocesan Partner

Farewill & The Church of England



A tailored journey for supporting local churches

- We've collaborated with CofE to build a tailored online will journey for supporting local churches
- Farewill's journey encourages people to consider supporting their local church and charities at two stages:
 - dividing their estate
 - leaving cash gifts

The screenshot shows the Farewill website interface. At the top, there is a navigation bar with the Farewill logo and links for 'Overview', 'Your will', and 'Who's in your will'. The main content area has a heading 'Would you like to include a gift to your church?' followed by a subtext 'Just 1% of your estate can make a massive difference'. Below this, there are two radio button options: 'Yes' (selected) and 'No'. A button labeled '+ Find your church' is positioned below the options. At the bottom of the main content area, there are two buttons: a grey '← Back' button and a yellow 'Save and continue' button. The footer contains the Farewill logo and links for 'Privacy' and 'Terms'.

Write your will for free

We're here to help you write your will in just 30 minutes. Your free will code **'NEWCASTLE-DIOCESE'** will be automatically applied at check-out.

Get started

Over 10,000 reviews · 4.9 on Trustpilot

★★★★★ Trustpilot



Proudly voted the nation's favourite will writer

★★★★★ 4 hours ago

Basic Will required - great ...

I just wanted a basic will to ensure when I was no longer around my estate was shared...

1 user

★★★★★ 4 hours ago

very easy to do and clear ...

very easy to do and clear communication between Farewill and me at all stages. would...

even suggest

★★★★★ 5 hours ago

Found the process simple...

Found the process simple and straightforward. Over the peace of mind at an affordable...

N/A 20

★★★★★ 6 hours ago

Excellent web site and ser...

Excellent web site and service well done

1 user Kevin Hughes

★★★★★ 7 hours ago

Very Easy to use

Very Easy to use

1 user

Rated 4.9 / 5 based on 11,149 reviews. Showing our 4 & 5 star reviews.

★ Trustpilot

DIOWINCHFREEWILLS

www.farewill.com/diowinchfreewills

Resources Available



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Parish Resources Stewardship Legacy Giving

Legacy Giving



Legacies are a huge blessing to our parishes.

Each year approximately 5,000 people leave a gift in their wills to a Church of England parish. This amounts to around £50 million in legacy gifts each year. These gifts finance mission projects, maintain beautiful church buildings and grow faithful communities.



Resources Available

CHURCH LEGACY
A lasting gift to your church

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You can be confident that your gift will be used to make a real difference to our future mission and ministry.


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PTO for an example Legacy Policy Template

For further information please visit www.churchlegacy.org.uk

 THE CHURCH OF ENGLAND

For the PCC

ENCOURAGING LEGACY GIVING

Legacies are a lifeline for our parishes. Each year around 4,000 people leave a gift in their will to a Church of England parish. These gifts can be used to finance mission projects, maintain beautiful church buildings and grow faithful communities. For many people, leaving a gift in their will is a final opportunity to make lasting gift to God. It is also a way to make a lasting difference to the future of their church and community. Many church members would like to know how they could leave a gift to the Church, although they might be reticent about asking. We've produced 3 Simple Steps your PCC can take to encourage legacy giving.

We encourage parishes to talk about the power of legacy gifts. Legacies should be in encouraged, but in a sensitive, low-key manner- drip-feeding appropriate messages in different ways throughout the year.

Step 1 - Request a free Legacy Tool Kit

The Toolkit provides everything you need to launch a successful legacy campaign. Helpful resources include a PCC Guide to Legacy Giving, there are also legacy leaflets, bookmarks and poster samples, Bible passages and legacy prayers.

www.churchofengland.org/our-faith/lasting-gift-your-church/information-pccs

Step 2 - Make & Communicate a Legacy Policy

A Legacy Policy is an important document that all parishes should have. It allows the PCC to prepare and discuss how they would wish to see a gift used. To develop your own legacy policy, please get in touch.

Request materials by emailing: stewardship@winchester.anglican.org

Step 3 - Make Legacy Literature & Resources Available

It is important to make quality literature available and visible for those who wish to find out more. We recommend making free information available so individuals can take it away and prayerfully reflect.

To view available legacy resources and receive digital copies, please contact: stewardship@winchester.anglican.org

For More Information Please Contact stewardship@winchester.anglican.org

"I think people should consider legacy giving as part of their overall stewardship because in many respects it is part of financial planning and giving, it is a way of giving back to the church community and family of which they have been a part."
Michael Smith - Winton Moordown Charminster



For the Incumbent and Wardens

battbroadbent
SOLICITORS

"Wherever you are, whatever your requirements."


Batt Broadbent are expert lawyers ready to offer personal service and support when it comes to helping you complete your will.

Batt Broadbent have been working in partnership with the Diocese of Winchester for many years, and act as Diocesan Registry.

The Diocese of Winchester is delighted to widen its relationship with Batt Broadbent, by partnering together to offer free wills to individuals across our parishes and communities.

Based in Salisbury, representatives from Batt Broadbent are there to support you personally and in a one-to-one capacity, whether in person or over the phone, in the office or at a convenient place and time for you.

Get in touch with the Diocesan Stewardship Team so that they can point you in the right direction to start you on your free will writing process.

 **Farewill** *The UK's #1 Online will writing service*

Farewill offers you the chance to write a will online in as little as 15 minutes, to take care of what really matters.

For many people in the UK, the processes around death are tough. Farewill is there to make things easier and friendlier – by enabling you to write a will from the comfort of your home.

Their specialist team has been voted best-rated on Trustpilot, and they have come out on top at the British Wills & Probate Awards for two years running.

Off the back of a successful pilot in 2021, the Diocese of Winchester is delighted to be partnering with Farewill to offer free wills across our Diocesan Community.

Get in touch with the Stewardship Team to find out more.

For parishioners

Faithwill Materials

- Service Materials
- Sermon outlines
- Suggested readings and songs
- Activities for kids

A woman with long dark hair, wearing a plaid scarf, is looking upwards with a hopeful expression. She is in a church setting, with stained glass windows visible in the background. A speech bubble with the text "Faith Will..." is positioned near her head.

Faith
Will...

National CofE Legacy Resources

- Case Studies

<https://www.churchofengland.org/our-faith/church-legacy/amazing-gift-case-studies>

- Information for PCCs

<https://www.churchofengland.org/our-faith/lasting-gift-your-church/information-pccs>

- Wording for your will

<https://www.churchofengland.org/our-faith/lasting-gift-your-church/wording-your-will>

What you Should do as a Treasurer

- Create and review your PCC Legacy Policy.
- Have resources to Promote Legacy Giving + Will Writing.
- Model this to your congregation and be available to chat and sign post.



Run a Legacy Campaign/Day

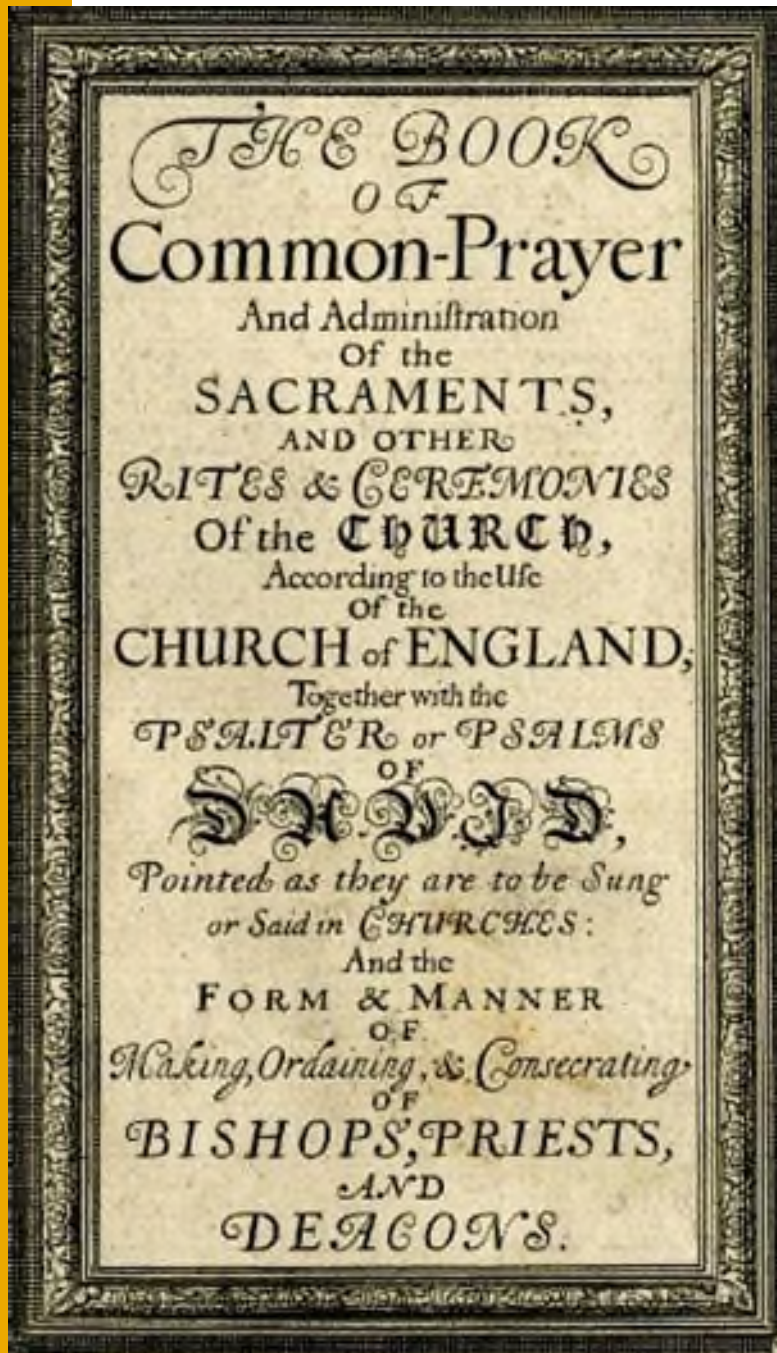
1. Plan – Gather materials, resources and information and share your vision
2. Talk about legacies: during a campaign over a designated period or during the day and throughout the year
3. Follow Up: Share stories when you receive a legacy – Celebrate (this is a great way to start a campaign or day)

6 out of 10
lifeboat launches
are only possible
thanks to a gift
left in someone's
will



Lifeboats





A simple act of good
stewardship since 1662

*“let him then be admonished to
make his Will... for the better
discharging of his conscience, and
the quietness of his Executors...
men should often be put in
remembrance to take order for the
settling of their temporal estates,
whilst they are in health”*

Book of Common
Prayer, 1662

Legacy Giving & Will Writing

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