

# Legacy Masterclass

A one-day masterclass with Richard Radcliffe on the future of legacy fundraising

For dates and locations please visit [www.actionplanning.co.uk/legacies](http://www.actionplanning.co.uk/legacies)

This one-day masterclass on the future of legacy giving and legacy fundraising is presented by one of the world's leading authorities in this field, Richard Radcliffe. It also includes expert advice from the legacies team at Stone King LLP, one of the leading firms of charity lawyers.

Legacies provide over £1.9 billion every year to charities and are one of the fastest growing sources of income. But times are changing fast. Typical legacy prospects are not just "Dorothy Dead Donor" but increasingly lapsed donors, major donors and volunteers.

Research in focus groups carried out by Richard Radcliffe shows that up to 60% of donors WILL leave a legacy asked in the right way and yet currently only 5% of those who die leave a legacy. The potential is huge – but what are the keys to success?

Richard will debate the future of the legacy marketplace and address key questions affecting legacy fundraising such as:

- **Gender** - do men and women want the same stories and stewardship? Do they need a different legacy ask?
- **Age** - can we approach a young legacy prospect in the same way as an older one and are the messages the same?
- **Wealth** - how should 'old money' and 'new money' donors be approached, and what type of ask works best with each group?
- **Segmentation** - how far should you go to segment your database and what increase in the number of prospects should you expect to achieve?

Richard Radcliffe will look at the future of legacy communications and how we can help effect greater change than ever before in legacy giving patterns.

The event is presented in association with Stone King LLP, one of the leading firms of charity lawyers, and will also examine issues around contested legacies.

The recent highly-publicised case in which the RSPCA lost a legal battle over a legacy has highlighted the difficult issues faced by charities in this area. Jonathan Burchfield, head of SK's Legacy Team, and one of the country's leading charity lawyers, will talk through the decision in the case (and other recent legacy cases) and will lead a discussion on the issues which arise for charities.



**Richard Radcliffe** is one of the world's leading authorities on legacy fundraising and lectures in the UK, North America and the Far East. He has specialised in this field for 20 years, and run around 1,500 legacy focus groups for 450 charities worldwide. Richard is a former Director of CAF and has served as Chairman of Smee and Ford and the International Fundraising Congress.



**Jonathan Burchfield** is a Charity & Education Partner at Stone King LLP, where he heads up the firm's Legacy Team. He has 30 years' experience in the field of legacies, charity law and governance. He is a Trustee (and former Chairman) of The Tubney Charitable Trust, a sizeable grant-making charity, and a former Deputy Chairman of the Charity Law Association.

# REGISTRATION FORM

You can book in four ways:

1. Enter your details online at [www.actionplanning.co.uk/legacies](http://www.actionplanning.co.uk/legacies) (you will then have a choice of either requesting an invoice, or paying online)
2. or email [anne@actionplanning.co.uk](mailto:anne@actionplanning.co.uk)
3. or fax (020 8770 2090) or post this form to **Action Planning**, Waymark House, 19 Cedar Road, Sutton, Surrey SM2 5DA
4. or phone Anne on 0208 661 8060

Please register the following delegates (**BLOCK CAPITALS PLEASE**)

**1** Mr/Mrs/Miss/Dr: First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Position: \_\_\_\_\_  
E-mail: \_\_\_\_\_

Mr/Mrs/Miss/Dr: First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Position: \_\_\_\_\_  
E-mail: \_\_\_\_\_

**2** Name of Charity/Organisation: \_\_\_\_\_  
Address: \_\_\_\_\_  
Postcode: \_\_\_\_\_  
Tel: \_\_\_\_\_

**3** Please indicate your preferred workshop date below:  
\_\_\_\_\_

**4** Please tick appropriate box:  
 I enclose my cheque for \_\_\_\_\_ (payable to Action Planning)  
*Attendance fee: £215 per delegate, including VAT, lunch and all presentation materials.*

Please register me/us and send me a VAT invoice. (Unless you specify otherwise, the invoice will be made out to your organisation).

I wish to pay by credit card (complete details below)

Visa  Mastercard  Switch/Maestro  Delta

Card Number

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Valid from \_\_\_\_\_ Expiry Date \_\_\_\_\_

Issue No. \_\_\_\_\_ Security Code \_\_\_\_\_

Switch/Maestro users only

This is the 3 or 4 digit code on the back of your card

**5** Please indicate any special needs or dietary requirements:  
\_\_\_\_\_

**6** Please tick the relevant box if you would like a free discussion with Action Planning about our services in any of the following fields:

Major Donor Fundraising  Research (e.g. into major donors or trusts)  Revenue Fundraising  
 Recruitment  Strategic Consultancy  Market Research  
 Capital Fundraising  Wealth Screening  
(Please write below how much you need to raise and for what purpose) \_\_\_\_\_  
to identify potential major donors

#### DATA PROTECTION

We would like to retain your address to send you invitations to future events and information on our work. Should you not wish to receive such communications, please tick here.

We would like to include your name, title and organisation (but not your address) on the delegate list. Should you not wish us to do this, please tick here.

#### CANCELLATION AND REFUND POLICY

All delegate fees must be paid in advance of the conference. Your fee is fully refundable, provided you cancel in writing more than seven working days before the conference. No refunds are available for cancellations within seven working days of the event, though substitutions can be made at any time.

#### PROGRAMME

Action Planning reserves the right to vary the published programme of speakers and the timing of the sessions.



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Attendance fee: £215 per person including VAT, presentation materials and lunch.

This one-day workshop, intended primarily for fundraising directors and legacy fundraisers, is organised by Action Planning in association with Stone King LLP.



#### Action Planning

Action Planning is a leading UK fundraising, management and recruitment consultancy to third sector organisations.

[www.actionplanning.co.uk](http://www.actionplanning.co.uk)



#### Stone King LLP

Stone King LLP is one of the UK's leading charity law firms, providing a full range of specialist support.

[www.stoneking.co.uk](http://www.stoneking.co.uk)