

Legacy Intelligence

IDENTIFY and ENGAGE

focus your fundraising with the UK's
most powerful legacy prospecting service



action 
planning
let's start from here

strategy and fundraising consultants

identify...

...potential legacy prospects

Legacy Intelligence has been created to help increase the return on your legacy marketing and is exclusively available through Action Planning.

Your legacy marketing campaign is probably your most cost-effective investment in your organisation's fundraising future. It calls for a delicate and sophisticated approach. Reliable, factual information on where to focus your efforts is hard to obtain.

Legacy Intelligence will give you:

- access to the **LEGACY PROSPECT DATABASE™**, a unique resource developed with our partners, **Prospecting for Gold**, combining property value, wealth and life-stage information on over 330,000 people
- advanced data analysis software
- the skills, experience and consultancy support of Action Planning

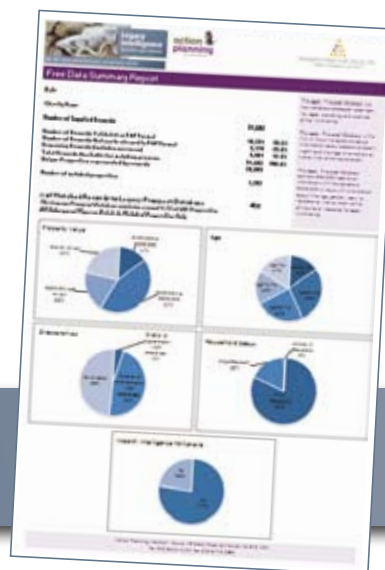
Getting Started: You can start with a free data summary to uncover the potential of your database.

The Legacy Prospect Database™ contains over 336,000 records of properties in the UK worth more than £500,000 and owned by individuals aged over 55. It is an invaluable resource of accurate information for identifying potential legators and contains a number of attributes for each household, including:

- length of residency
- property value
- whether they are likely to have dependents
- other wealth information

The database is continually being refreshed to ensure that the data we use for your screening is as up to date as possible.

We can screen your donor and contact lists against the Legacy Prospect Database™ to identify those of your supporters who have the potential to make a significant bequest to your cause. Our sophisticated data manipulation software enables us to analyse the results and select data based on any variable you choose, ensuring that you get the data you need, at the time you need it.



Legacy Intelligence information is available at different levels of detail:

Screen and Analyse:

Identify and prioritise the legacy prospects on your database.

COST: £500 (or free with wealth intelligence screening).

Legacy DM tag: A marker to upload onto your database which identifies that the individual is a legacy prospect.

COST: £2.50 per name.

Legacy Prospect Report: An overview including house value indicator and life-stage information.

COST: £5 per name, reducing to £2.50 if Legacy DM tag has been purchased.

All charges listed are subject to VAT.

engage...

...and recruit legacy prospects

Once we have identified those of your supporters who are most able to leave a significant bequest to your cause, we can work with you to convert these legacy prospects to pledges.

We help you to plan your approach as part of a wider legacy marketing strategy. We will assess which approach is likely to be the most effective for existing supporters and which additional and enhanced activities should be undertaken to acquire new legators.

Action Planning can help you answer the key questions. What role should direct mail play in your acquisition and conversion of enquirers to intenders and on to pledgers? How does a free wills clinic or scheme fit into your plans? When is it appropriate to buy into a wills advisory service? Does becoming a member of a legacy consortium work? What about advertising in solicitors' guides or your own magazines and newsletters? How do you make the most of events, peer asking or focus groups?

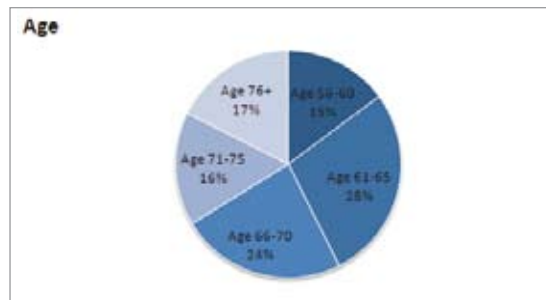
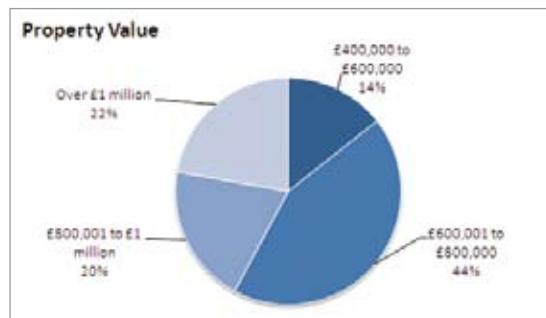
Action Planning can maximise your legacy income by:

Reviewing current performance

We will use our experience of many and varied organisations to appraise the health of your existing legacy communication programme. Our review will result in a number of next step recommendations helping you maximise your legacy income.

Devising your legacy marketing strategy

We will work with you to define your target audiences and devise a plan to determine how each of those audiences will be approached and nurtured. The plan will include income and expenditure projections which reflect your income targets and the resources you have available to invest.



Example of supporters' property value & age

Developing a proposition that works

Action Planning will work up a reasoned, convincing, yet sensitive argument why someone should leave a bequest in their will in support of your cause. This can lead to the development of legacy literature and carefully crafted text for your website, newsletters and other communications.

Training your teams to sell legacies

Our bespoke training events will give your staff and volunteers the confidence to promote legacies effectively to small groups of prospects or individual contacts. This training can make all the difference to a legacy campaign and maximise the regional staff networks of national charities.

Legacy implementation and management

Action Planning will equip you to implement the strategy or you could contract out to us your complete legacy programme or elements such as campaigns, pledger care programmes, database systems and probate resolution.



Next Steps:

Phone Action Planning:

020 8642 4122

or email:

legacy@actionplanning.co.uk

Move forward with Action Planning

Whatever challenges and opportunities your organisation is facing, Action Planning can help with the next stage of your journey.

As a leading UK consultancy to the not-for-profit sector, we have helped hundreds of organisations to raise capital and revenue funding, recruit key people and plan ahead. We work alongside our clients, helping each to make the journey in their own way, and at their own pace.

Our staff have senior-level third sector experience in a range of disciplines and work as a team to deliver practical solutions to client needs.

We provide a combination of advice and 'hands on' implementation for capital appeals, revenue fundraising and bid-writing, research, strategic consultancy and recruitment for senior posts.

Action Planning operates internationally, both in Europe through our membership of EU Consult and in the United States, where we have an associated office in Boston.

We also work closely with ACEVO and key funders to organise the largest UK events for third sector leaders.



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In partnership with:



PROSPECTING FOR GOLD LTD.
Wealth Intelligence Services™