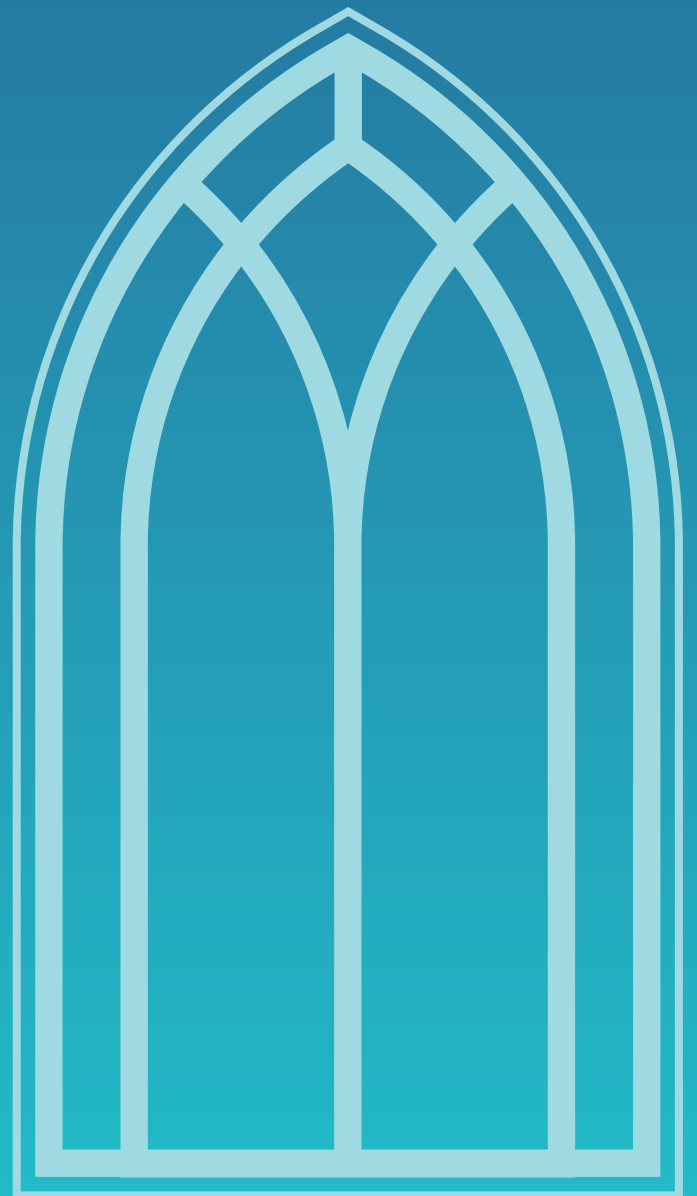


Talking About Legacies to your Congregation

A Calendar of Ideas for Clergy
and Church Leaders

Revised April 2025



THE CHURCH
OF ENGLAND

Diocese of Leeds

The Purpose of this Legacy Pack

Legacy communication is often seen as being onerous and most of all, difficult for our clergy to approach with their congregations. There is the fear about talking about death and awkwardness in asking for the pledging of legacy gifts. What fails to be acknowledged is the joy and the promise that making a bequest brings for the donor.

This may be the only donation that someone will ever make of hundreds, perhaps thousands of pounds and their gratification in knowing that their gift will truly make a difference should not be underestimated.

Gifts in Wills should be encouraged, but in a sensitive, low-key manner, drip feeding messages in different ways throughout the year. This ensures that legacies are seen as a normal way of supporting your church and not something strange that is rarely ever talked about!

This pack is intended to help parishes to understand legacy fundraising in the church and give useable examples of how to promote legacies to congregations sensitively, legally and ethically throughout the year. There's no need to do everything suggested here you can pick and choose the ideas that appeal to you and your congregations.

If you have any questions, or want to find out more about your church's previous legacies, then get in touch with the Stewardship team at resourcingparishes@leeds.anglican.org.



Jennifer Robinson
Parish Support Accountant

Beth Vickers-Smith
Stewardship Officer

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Senior Stewardship Officer

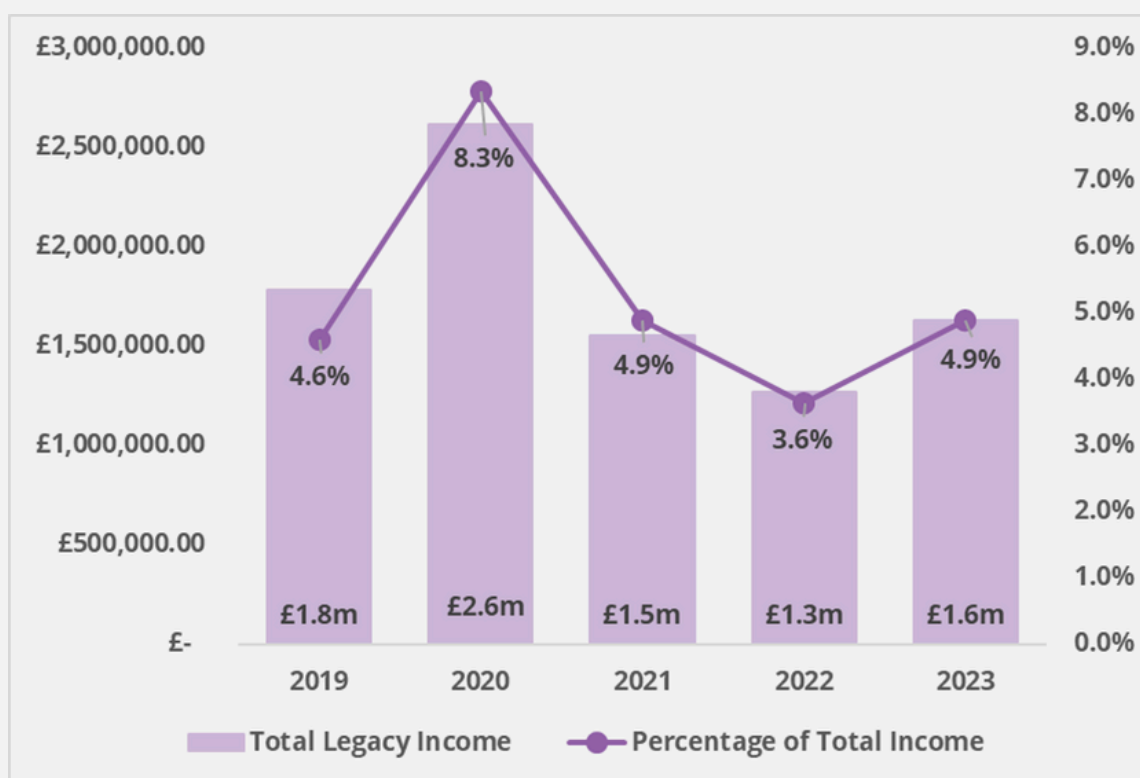
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Introduction

Leeds Legacy Picture

In 2022, legacies formed only 3.6% of total income to parishes in Leeds Diocese, less than the national average of 6.2% and significantly less than the entire charity sector average of 14% of total income. This improved slightly in 2023, growing to 4.9%.



Findings of the Church of England - [The Anglican Giving Survey](#)

In 2020, the National Giving Team conducted a survey with 2000 Anglicans to find out their thoughts and experiences with giving in their church.

One of the top 10 findings from this report is that Anglicans are three times as likely to leave a legacy to charity as they are to church. Churches are encouraged to provide information about why legacies are needed and communicate this to their communities.

Why should every Christian have a Will?

We see ourselves as God's stewards, entrusted to use His gifts to us, for the good of our family and our Church family.

In thanksgiving, we should also take Will writing seriously – setting our affairs in order and stewarding them wisely to the end of our time on earth and beyond.

Messaging

The best messages to communicate about legacies are those that promote the vision of your church and the part it plays in your legators' lives. People don't really want to leave a legacy to fund maintenance projects although it's true that good maintenance leads to freedom to spend resources on mission in your church.

Givers would rather feel they are contributing to the life and work of the church, in other words, the mission and ministry, so 'visionary' language is crucial and this document gives ideas for this.



More importantly, conversations about death and dying are very challenging for people to think about. No one likes to think about how or when they will die as it creates huge anxiety.

If we can think things through beforehand, it can make things easier when those moments come and this is something to emphasise when you talk to people or write communications on pew sheets or websites.

January

We Can Start by Saying Thank You

The [Chartered Institute of Fundraising](#) has said that legacy givers are often those with a long-term relationship to the charity. It is important to nurture those relationships, and regularly thank those involved with your church, regardless of whether they are giving financially or not.

To understand why we need to say thank you and look after the Church's planned givers, it is helpful to look at the Donor Pyramid.



[The Donor Pyramid Fundraising Tool](#) by Meyer Partners

When we look at the people who donate to our church, there are more at the bottom category than at the top. How do we try to encourage people to become more generous and move up the pyramid? The answer is we look after them!

Saying thank you is crucially important to ensure that every donor is certain that their gift is appreciated and going to a good cause. Get creative and pen a thank you letter or a card that really expresses the importance of gifts to your church in the previous year and speak about the impact it has had for all

THANK YOU!

I am writing to you today to say Thank You! Your generous giving enables the work in our church to continue, helping our community to thrive.

Last year we were able to:

- start a new youth club, with set up costs of over £1500.
- pay our Parish Share in full, contributing our share of the costs of ministry and mission in our community.
- upgrade the kitchen in the church hall and repair the church heating system. This ensures that we keep our building in good shape.
- give away over £1000 to support our two chosen mission agencies and charities; Malawi schools and Christian Aid.

All of this takes time and money, and it wouldn't have been possible without your generous contributions – your kindness is making a real difference!

Signed: _____



February

Church of England Legacy Tools

February is a good time to get to grips with what the Church of England provides to help you with legacies. Get familiar with [Church Legacy](#) and download a variety of resources to build your PCC Legacy Toolkit. The resources include booklets, posters, flyers, bookmarks and a PCC guide.



You can order free sample packs from CPO (the CofE Print Shop) or download the resources to print locally from the Church of England website [here](#).

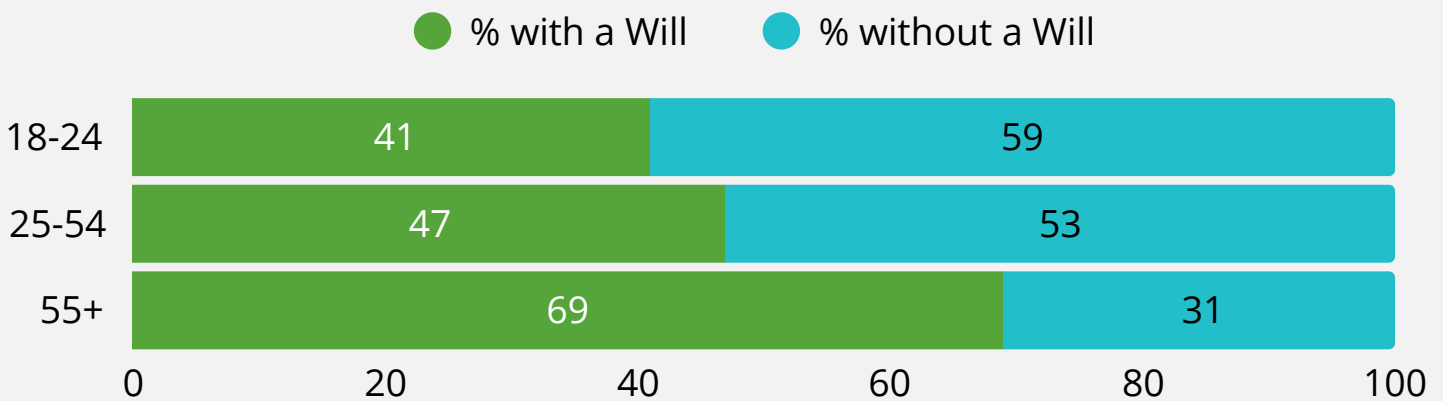
These resources include a template legacy policy, and guidance for wording leaving a gift in a Will. It is good practice to have a legacy policy in place at your church, in order to make leaving a gift as easy as possible. It is also important that this policy is visible, and accessible to anyone coming along to your church, include this as part of your giving literature on your website and in your church building.

March

Write Your Will for Free with Farewill

The Church of England has partnered with Farewill, an online Will-writing service, to offer free Will writing to congregation members. The online tool is really easy to use, and writing your Will should only take around 30 minutes.

It is important to make a Will and ensure it is kept up to date so that your wishes after death are carried out, giving you and your loved ones peace of mind. According to [The National Will Register](#) in 2024, just over half (53%) of UK adults have a Will, but fewer have discussed their intentions with another person.



[The National Wills Report 2024.](#)

Farewill is the largest UK Will writer working with experts that check each Will to ensure everything looks as it should. This service provides legal forms and information but does not provide any legal or tax advice, nor can you use Farewill to amend existing Wills. If you require legal advice, advice for complex estate planning, or amendments to an existing Will, then do be in touch with a solicitor.

You can find out more about Farewill on the Church of England website [here](#).

We recommend that all churches use their website to explain how someone may give to the church, including how to give regularly, or leave a one-off donation. On your website, you can explain how one may leave a legacy, if they wish. It is important to provide the contact details of a member of the church who can speak with someone sensitively about writing a Will or leaving a legacy.

Use our template wording below on your website to explain how your community can write their Will for free using Farewill.

We are privileged if we can leave a mark of our passing, to be remembered by those people and causes we've cared for in life. A gift in your Will to your church is one of the most valuable and lasting ways you can continue to support its mission and ministry.



Making a Will can typically cost over £150, however, you can write your Will for free using Farewill. The Church of England has partnered with Farewill, a trusted Will writing website, to offer congregation members the chance to write their Will for free.

We pray that as you plan to distribute your estate, you will feel encouraged to remember your church family and we invite you to consider how a gift in your Will could help the Church meet the needs of future generations.

Go to <https://farewill.com/cofe-web>, or scan the QR code, to create your Will today.

If you would like to discuss this further then do get in touch with _____.

Thank you for considering leaving a gift to our church.



A Parish Legacy Impact Story

One of the best ways to inspire people to act is through telling stories, and sharing how big a difference a legacy gift can make to a church community. Read about the impact of a gift left to St Margaret's church in Horsforth below.

When the church of St Margaret's in Horsforth were left a legacy gift from a dear departed member of their congregation who was a former midwife, they could think of no better use for it than a font project.

Freda Plews' gift enabled the Church to replace their font with one relocated from the closed church of St Barnabas in Hightown. At the same time, they took the opportunity to move the location to make room for a kitchenette at the back of the church.



The team at St Margaret's were able to find a second use for their old font in the church garden as a planter full of beautiful new plants.

To celebrate the work, Revd. Nigel Sinclair arranged a baptism celebration, showcasing vintage baptism clothes and registers for visitors to view and a special Sunday service for everyone, particularly those who had been baptised in the 'old' font.

One of the reasons that people leave legacy gifts is to 'live on' and to be remembered after their deaths. Imagine how Freda's close friends felt, seeing her life celebrated and 'lived on' in this special way.

Sharing legacy stories like this one with the congregation not only celebrates the life of a loved one, it also gives people confidence that the gift will be spent well. Giving people confidence that precious legacy gifts will make a difference and be spent wisely is crucially important if you are hoping to grow the numbers of legacies received.

Follow our top tips to write a story like this for your church:

1

Talk about a recent legacy received in services and give thanks to God for the donor's life and kindness

Put the money to good use (according to your PCC legacy policy) and celebrate the completion of the works with an event

2

3

Use phrases such as "thanks to Mr Jones' generosity/kindness/benevolence/thoughtfulness in life we are able to make a fitting and lasting tribute to him in our church by..." in your literature

And finally, inform people about how they could leave a lasting gift in their Will, pointing to helpful literature and leaving contact details of someone to discuss this with.

4

Find a Living Legacy Ambassador

By this time in the year, and assuming all your legacy messages have been heard loud and clear, you may have encountered a congregation member or two who have indicated that the church is to be a beneficiary in their Will. You have earned their trust and confidence and inspired them to give you a legacy gift.

Living legacy donors are like legacy gold for they can be the ambassadors for legacy giving. Have you seen the advertisements on the television that show people saying why they have chosen to leave a gift to charity?

“The only thing you take with you when you’re gone is what you leave behind so I have chosen to leave a gift in my Will to the children’s hospital because I know it will make a difference to the lives of the young.”



Charities use the fact that people ask themselves “what are people like me doing?” to appeal to new legacy donors. If your congregation see that someone is leaving a gift to the church, the hope is, they will do the same.

If there is someone in your church who would be willing to talk about what the church means to them and why they have chosen to leave a gift in their Will then use it! Print it on your pew sheets or publish it on the website. If you can’t find a living Legacy donor then try making a display of the Church Legacy material with some general quotes.

Use our display template to inspire others to leave a gift to your church.

Can You Leave a Legacy to our Church in your Will?

Hear from others in the church who have left a gift for us in their Will

"The Church has been here for me when I have needed it and I want it to be here for my children when I have gone"



"I love being a member of my Church. It gives me a true sense of belonging and kinship with fellow Christians"

"My church has taught me to be a true follower of Christ and live life according to God's will"



"The beauty of this historic place is beyond measure. It needs preserving for future generations"

An 'Always On' Approach

For several years, charities have been investing in online legacy promotion, and it seems to be paying off. The Salvation Army reported that 22% of all income in 2023 came from legacies, and in the same year, Christian Aid received £14.7 million from legacies, representing around 16% of all income. Compare that to the Church of England's 6% and you can see there's some catching up to do.

These charities have adopted an 'always on' approach to legacy information. In other words, whenever a donor thinks about leaving a gift in their Will to the Salvation Army or Christian Aid, they can always access information online.



If you have a website, you might consider dedicating a whole section to legacies, or at the very least consider pointing people to the legacy pages on the Church of England website, available at the link [here](#).

You can also add in information about giving and leaving a legacy on your A Church Near You page.

Key information to include on your website is:

- Why legacies are important and what a legacy would mean to your church
- The PCC legacy policy
- Stories about previous legacies, or a living legacy account
- How to leave a gift in a Will

This is the bare minimum, but you can see how much effort the major charities put into their legacy pages and you might wish to really make a feature on your website.

Note the tone of the messages from the Salvation Army and Christian Aid, and use similar sensitive, gentle and reassuring wording. They also highlight the core of their vision, explaining briefly why their work is so important, and why that needs resourcing through legacy gifts.

'Turn your lifetime of hope into the change you want to see in the world with a gift in your Will. If you hope for change, Will it. Hope is an unstoppable force. Hope unites us. Hope fuels action. A gift in your Will can be a beacon of hope and create a world where everyone can live a full life, free from poverty.'

Christian Aid

'By leaving a gift in your Will to The Salvation Army, it is a wonderful way of offering life-changing support to the most vulnerable people in our society. Almost 50% of the money donated comes from gifts in Wills. These donations serve as a vital source of income, making it possible to carry out valuable, wide-ranging, and long term work'

The Salvation Army

'Once you have made provision for your loved ones, you have the opportunity to make a lasting gift to God, by leaving a legacy to His church. A gift in your Will to your local church is one of the most valuable and lasting ways you can continue to support its mission and ministry within your community.'

Church Legacy

July

A Legacy Event

July, the season of outdoor events, is a great time to hold a legacy get-together. Many different variations of event are possible and it all depends on what your congregation like to do. Could you have a bring and share supper, afternoon tea, strawberries and cream, Sunday brunch, a picnic, a cheese and wine party? The idea is to bring people together so you can talk to them.

A typical programme of the event may look something like this:

| Time | Activity | Person | Notes |
|------|---|----------------------------|---------------------|
| 6:00 | Arrival | | Refreshments served |
| 6:30 | Welcome Prayer CofE Legacy Video Our Church and Legacies Legacies and the Christian Giver | Incumbent or Church Rep | Introduce leaflets |
| 6:50 | Interview with legacy giver | Legacy Giver | |
| 7:00 | Importance of making a Will | Solicitor | |
| 7:20 | Break | | Refreshments |
| 7:30 | Preparing for your funeral Arranging a loved one's funeral | Funeral Director | |
| 7:40 | Q&A | | |
| 8:00 | Final comments & closing prayer | Incumbent or Church Rep | |

Incumbent or Church Representative

This person can help to ease the atmosphere and give people a sense of 'it's okay to talk about this'.

- Reflect on your vision and mission
- Highlight the importance of Christian Giving and why every Christian should have a Will. Leaving a legacy might not be for everyone, but for some is an appealing way to give
- In talking about legacies, you must also talk about death, and the importance of life, death and resurrection
- Remind people of the current funding priorities
- Explain why legacies are important
- Share how legacies have been used in the past and the impact they've had
- Explain how future legacies could make a difference and how they can be left
- Introduce relevant literature and information available
- Highlight the opportunity to speak to representatives after the talk.



Legacy Ambassador

- Introduce themselves and their connection to the church
- Explain why they have left a legacy
- Explain why the Church/Cathedral is important to them
- What difference they hope it will make

Note - this will be the most powerful and persuasive part of the event

Will Writing Professional

- What is a Will and why do you need one
- How much a Will costs
- Briefly explain inheritance tax
- What a legacy is and the types of legacy gifts that can be left
- Highlight the opportunity to speak privately after the event



When you send invitations, make it clear that people will not be asked to leave a legacy or make a donation on the day. The event is simply to find out more about this form of giving and have an enjoyable time at your Church or Cathedral.

The Church of England have created a resource titled 'Celebrating Our Legacy' as part of their Generosity Week resources. This resource invites others to explore parts of the church that are only there because of a previous legacy. This could be a stained glass window, a historical font, a beautiful altar or the music sung in the church choir. The session looks at telling the story of your church, and how the building and congregation serve the community.

One of the main elements of the session is leading a tour around the church building, either as a large group or letting smaller groups walk around freely. If you have any keen volunteers to help tell the church story, do enlist them to help out with this tour. Alternatively, you can write up some facts about the church and have these spread around the building, leading the group around like a treasure hunt.



This beautiful font was commissioned by a local family, after the passing of a loved one.



Our Youth Worker's salary comes in part from a generous gift left to us in 2017.



Back in 1968 we received a legacy to support the upkeep of our building and from this generous gift we were able to repair the roof so we can meet in a dry and warm welcoming space.

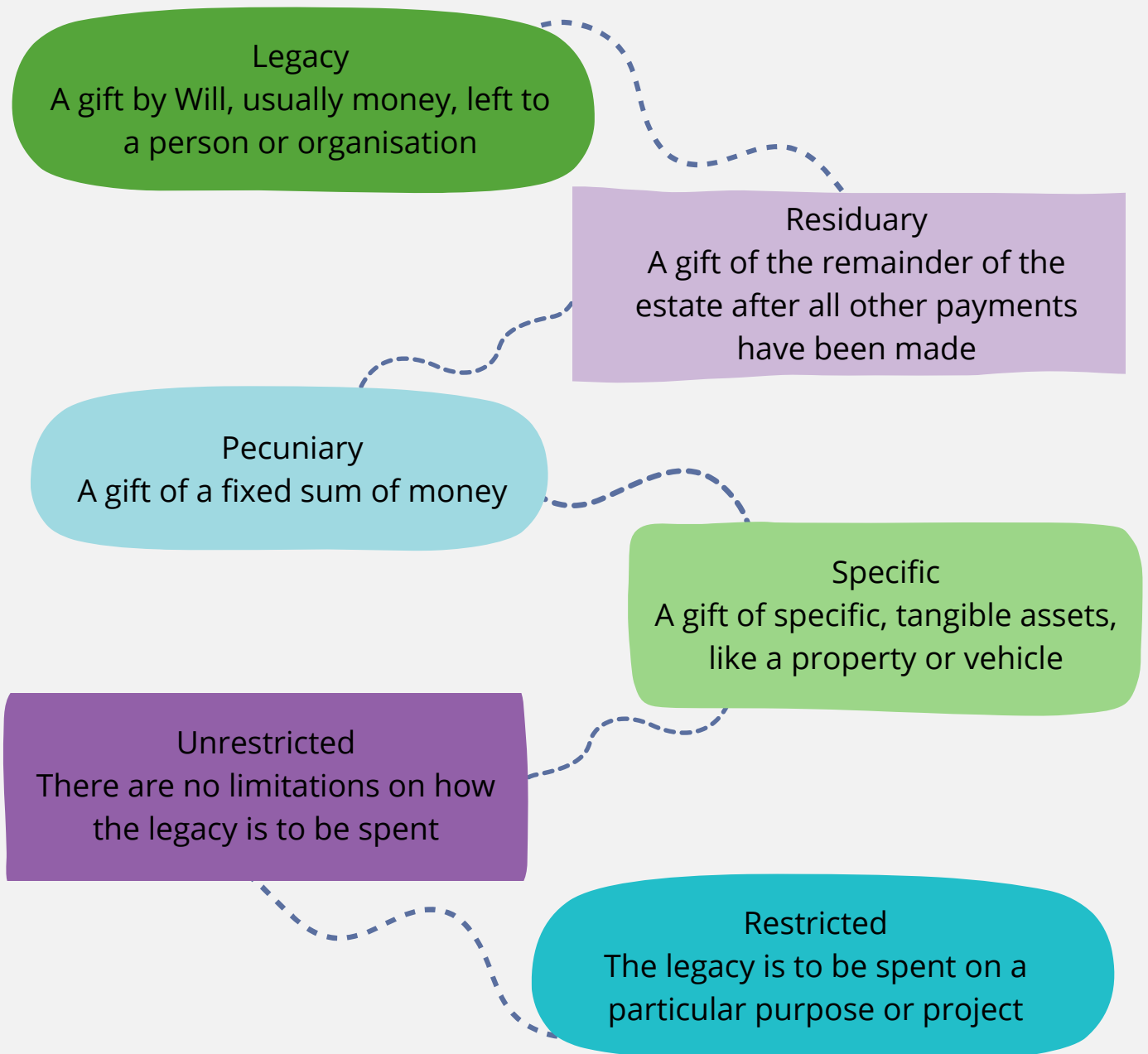
After this tour, gather the group together for some activities and a small talk around legacy giving. You can find all the session guidance [here](#), and the content pack [here](#).

This session can be adapted to suit any open church event you may have, allowing visitors and those in your local community to explore the difference a legacy can make to the church.

August

Legacy Facts

August is usually quiet in the church with so many people away enjoying their holiday, so it's a chance to broaden your understanding of legacies starting with some definitions.



In legacy fundraising, it is essential to be aware of the incredibly sensitive issues involved: often large amounts of money in Wills, bereaved families, potentially vulnerable audiences and the connection with death.

In line with the Institute of Legacy Management's ethical framework, the Church of England is committed to fulfilling donors' final wishes with sensitivity, transparency, integrity, collaboration and keeping loved ones informed.

The Church of England has provided a few templates to support givers with wording their legacy in their Will.

See below some examples.

To Leave a Share of Your Estate

"I give ___% of my residuary estate free of all taxes to the Parochial Church Council of the ecclesiastical 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."

To Leave a Fixed Sum of Money

"I give the sum of £____ (pounds only) free of all taxes to the Parochial Church Council of the ecclesiastical 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."

Plenty of people in your church may have already written their Will and to save the trouble and expense of re-writing, they can add a codicil. A codicil is a legal document which allows amendments to an existing Will. Codicils, if filled out correctly, should not need the advice of a solicitor, but it's always best to get in touch with them if you have any doubts.

Sample codicil wording is shown below

Codicil

"I, _____ (name) of
_____ (address)
declare this to be the _____ (1st/2nd/3rd etc.) Codicil to my Will dated
_____ (date). I give: _____ % residuary estate
OR a gift of £ _____ (_____)
*[choose one of these options and delete the other. If choosing the latter
option, insert amount in numbers, then, in brackets, in words]* free of all
taxes to the Parochial Church Council of the ecclesiastical 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. In all other respects I confirm my Will and any
previous codicils thereto. In witness whereof I have hereunto set my
hand on this the
_____ (date)
Signature _____ (your signature)

This codicil was signed by the above named person in our joint
presence, and then by us in his/hers.

Signature _____ (witness signature 1)
Name _____
Address _____
Signature _____ (witness signature 2)
Name _____
Address _____

September

Faith Will

September is a good time to restart the conversation on Legacy giving at the start of a new term. One way you can do this is through Faith Will, the partnership between the Church of England and Christian Aid. This campaign is designed to encourage church goers to consider leaving a gift in their Will to both Christian Aid and their place of worship. This encourages us to support the local community, as well as the global community. This campaign runs alongside the Church of England's partnership with Farewill to continue to offer a free Will-writing service.

The campaign is especially helpful when faced with the statistic that Anglicans are three times as likely to leave a legacy to charity as they are to church ([The Anglican Giving Survey, 2020](#)). Faith Will provides the option for your givers to support both.

See below a few different ways to promote Faith Will.

1

Hold a Faith Will Service
Use the worship resources to lead a legacy-focus service

2

Book a Speaker
Christian Aid has a team of trained speakers available to share the power of gifts in Wills.

3

Light Touch Approach
Weave in 1 or 2 resources to a regular service. You could play the 3-minute film during the notices.

4

Use the Activities
Try out some group activities as part of a coffee morning to bring people together

The first thing to do is [sign up](#) as a church to receive a suite of resources that you can use to promote Faith Will with your community.

These resources include leaflets, posters, and videos. The team have also put together worship resources including sermon starters, readings, hymns and all-age activities.



One of the key resources from Faith Will is their offer of a trained speaker coming along to your service/meeting to share the message for you. This is a great opportunity for your congregation to hear about legacy from an external voice, although this isn't an excuse for clergy to take a backseat.

You can book a speaker by:

- E-mailing the team at legacyteam@christian-aid-org
- Calling 020 7523 2493.

October

A Memorial Service

Plan a special memorial service to celebrate the lives of loved ones and invite the whole community to come along.

Consider these events need to be both inclusive and accessible, regardless of the nature and extent of the beliefs of those attending. Should the service be traditional, or creative, or a blend of both.

Welcome

Hymn: Abide With Me

Poem: 'Sometimes I need Strength' - Tom Gordon

Hymn: Be Still, For the Presence of the Lord

Poem: 'Sorting Through' - Liz Lohead

Act of Remembrance: Light a candle, read the names of those deceased, or tie a message to a tree

Quiet Moment of Reflection

Thanksgiving and the Lord's Prayer

Bible Reading: 1 Corinthians 15:35, 37-38, 42-44

Reflection

Hymn: Be Thou My Vision

Poem: 'If I should go before the rest of you' - Joyce Grenfell



Detailed guidance and resources are given on the excellent website from the Association of Hospice and Palliative Care Chaplains [here](#).



Whilst not the primary focus of the gathering, it can be appropriate to ask for donations for the church in a sensitive manner.



“Your presence here this evening is a blessing and our entire church community thank you. As you leave, please would you consider leaving a gift to enable us to continue our work of supporting the bereaved thorough the funeral process and as they come to terms with their loss. Please know, that we are also here to pray and support you as you remember your own relatives and friends”

Remember that lots of people don't carry cash so having a contactless payment solution would really help at events like this. There are lots of different mechanisms available to use to maximise this type of giving.

You might also send each of your congregation away with a personal card or candle or some other token from the church. They could find it a comforting gesture and a reminder of a very special occasion.

November

Take a Look at 'GraveTalk'

For those with big questions about death, dying and funerals, having someone to talk to can be invaluable. But how do you start those conversations, and with whom? There are a growing number of café spaces which bring people together to do just that – this section tells you more about GraveTalk, launched through the Church of England.



The Church of England has been helping people think about these questions for centuries. GraveTalk is a café space, organised by a local church, where people can talk about these big questions. The conversation is helped along by GraveTalk conversation cards – 52 questions covering 5 key areas.

Events have been held in locations across the country, and people of all ages have gathered to talk and share their thoughts about death, dying and funerals. GraveTalk is a café – so there is always tea and cake.

A GraveTalk Event can take place in a church hall, community centre or even a High Street café. People arriving will be welcomed by the person running the event – it may be the vicar or someone else from the church – and then invited to sit at tables with three or four others. The GraveTalk cards will be on the tables, and each group picks a question and uses it to start a conversation. It doesn't matter if you only use one question – or work through all of them! The purpose is to talk and listen.

Light refreshments are offered throughout the event, which lasts about an hour, or longer if needed.

This is not strictly a legacy event, although it wouldn't hurt to subtly leave a few legacy leaflets out or have a legacy display. Rather, it's an opportunity for people to explore what can be uncomfortable issues surrounding death and dying and conversations that you may have in the future with your congregation about legacies, do not seem so strange!

The GraveTalk website says more at the link [here](#).

Life

What is important in your life?
How would you like to be remembered?

Death

What experiences of death have you had so far?
What do you think death means?

Society

How has our culture shaped our thinking about death?

Funerals

What will happen when you die?
Do you need to make any plans or choices now?

Grief

What is the reality of loss and how do you experience it?

December

Giving in Memory

December is the month to explore how your church receives financial gifts given by the living relatives and friends of someone who has died.

Giving in Memory is a unique way for people to honour the memory of a loved one and to keep the memory of them alive, it is also thought to be a way of helping the grief process.



Churches often host a prayer space where people are encouraged to kneel or sit in prayer and light a candle for a small donation and these are often places where people remember their loved ones, but there are other ways you can receive donations.

Some churches have a tree onto which ribbons or leaves are placed with the name of the loved one, others have a memory book where precious memories can be shared. Some receive in memory gifts to purchase flowers or new hymnals and bibles and have explored online tribute pages to write fond memories of loved ones lost.

Giving in memory is:

A way of repaying an organisation for the role they played in someone's life



A way to connect with others, bringing people together



A way of keeping a link with the loved one and part of the grief healing process



A way to create a lasting memorial



Giving thanks for a loved-one's life



If you have led a thanksgiving service for a family, it might be helpful to keep a record of the dates of these services to get back in touch on the anniversary to offer further support. If the families raised money for the church, or previously given in memory of a loved one, you can use these anniversaries to update them on how the donations have been used.

You can explain how their generosity has made a difference, for example having an extra bench in the church yard for the community to use, or donating towards the upkeep of the church ensuring the building stays warm and dry.

Giving in memory is important to different people for different reasons.

Is your church enabling or denying people the opportunity to give these gifts?

Helpful Websites and Resources

For all information relating to gifts in Wills for the Church of England
<https://www.churchofengland.org/faith-life/church-legacy>.

Write your Will for free with Farewill

<https://www.churchofengland.org/faith-life/lasting-gift-your-church/writing-your-will/free-wills>

Explore the partnership between the Church of England and Christian Aid to promote legacy giving

<https://www.christianaid.org.uk/appeals/key-appeals/faith-will>

Information about a Church of England funeral

<https://www.churchofengland.org/life-events/funerals>

Information about Gravetalk – a café space to talk about dying and death

<https://www.churchofengland.org/life-events/funerals/after-funeral/what-gravetalk>

The Association of Hospice and Palliative Care Chaplains to find information about running a memorial event

<https://www.ahpcc.co.uk/practical-resources/orders-of-service/>

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