

# We are Bequeathed

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This is what we  
offer charities

**bequeathed**   
free wills, valuable advice



# We help you boost your legacy fundraising

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**We help people make the right will for them and their families, in the way that suits them best.**

We also do everything we can to encourage them to remember the causes they care about, because we know how important gifts in wills are to charities like yours.

We're working with some of the UK's biggest charities, so you can have peace of mind that we understand legacy fundraising.

Our business model benefits everyone – charities, your supporters and the law firms we partner with.

If you like what you read, please get in touch!



# We offer you a way to increase your legacy gifts

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With our platform, anyone can make their will online, **for free.**

We give them expert guidance throughout and also help them identify when they need legal advice. If they do, we refer them to one of our partner law firms to agree a price to complete their will.

We ask everyone who uses our platform to consider leaving a gift to charity. Your supporters are specifically asked to leave a gift to you.



# We're here to help charities

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## Partnering with us gives you lots of benefits.

We present your cause to more prospective legacy donors.

We improve every step of the legacy marketing journey for your supporters, from their initial enquiry through to reporting on the pledges they make. By giving them online, phone and face-to-face options, anyone can start a will straight away – and more people are able to complete it.

**Most importantly, we give you a clear return on your investment.**



# We're here to help your supporters

With our platform, your supporters can make the will that best suits them and their families. Bequeathed gives your supporters:

- Convenience. They can start their will whenever it suits them, and update it if their circumstances change.
- Expert guidance throughout the will-making process.
- Savings – of both time and money – if they need legal advice. That's because our partner law firms pick up from where they left off on our system, without charging for starting from scratch.



# We're here to help law firms

**We work with law firms, not against them. And their partnership helps us make our will-making service free for your supporters – and keeps your costs down.**

We don't ask law firms to take on the cost of writing a simple will for little, or nothing. But solicitors still write the vast majority of wills: those where specialist legal advice is required. And by delivering new clients to them, we help your supporters get qualified support, rather than sending them to online start-ups with little or no legal experience.



# Getting you the results you need

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After our six-month pilot with six of the UK's biggest charities, the Bequeathed platform generated an amazing £3.2 million in pledges from a cold audience – and that was using PPC alone. We know ROI is one of your priorities, which is why we're so pleased this got 4:1.

**In this pilot, 20% of people who completed an online will using Bequeathed left a gift to charity. Their average gift was £10,000.**

Since then, we've developed Bequeathed in some key ways:

- We've brought law firms on board, to pick up supporters who might otherwise have dropped out of the process.
- We've started working together with charities, law firms and other partners to promote Bequeathed to even more audiences.

# Here's who has already put their trust in us:

We're working with the legacy fundraising and admin teams in 29 charities, ranging from household names to smaller causes. Seven top 500 Lexcel accredited law firms have also put their trust in us.





# We give you more than an online platform

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With Bequeathed, your entire legacy marketing funnel is supported:

- **You get more legacy leads.** Our solicitors, other charities, corporate partners as well as our paid search activity all help attract new donors to your cause.
- **You get in-depth legacy reporting.** We capture data at every stage of your supporter's journey, giving you detailed insight.
- **And your stewardship is boosted.** We keep in touch with people who use Bequeathed to help them maintain their will, and we can add in your stewardship messages too.

Plus, we give you ongoing support, and the chance to attend regular meetings with other charities who use Bequeathed. We give you the opportunity to learn from each other.

# You can trust us

**The Bequeathed platform is a mature product, developed over five years with hugely experienced and respected solicitors.**

Bequeathed gives your supporters the will-making experience they deserve: one which is tailored to their needs.

We know charities like yours often need to satisfy due diligence requirements before creating partnerships with companies like us. That's why we've created a detailed FAQ document to help your internal process go smoothly. If you'd like it, just ask!



# We're specialists

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**Our core team has a wealth of legal and legacy fundraising expertise. A fantastic wider team of industry experts supports us – and, by extension, the charities we work with.**



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Jon Brewer – our founder and CEO. Jon is a former solicitor and director of LexisNexis. He developed the concept of Bequeathed while working for the acquirers of his first legal software business and bought back the wills IP to launch Bequeathed.



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Emma Rylance – our Head of Business Development. Emma has 13 years of fundraising experience under her belt, most recently heading up the team at British Red Cross. She loved working with Bequeathed charity side – hence why she's joined us!



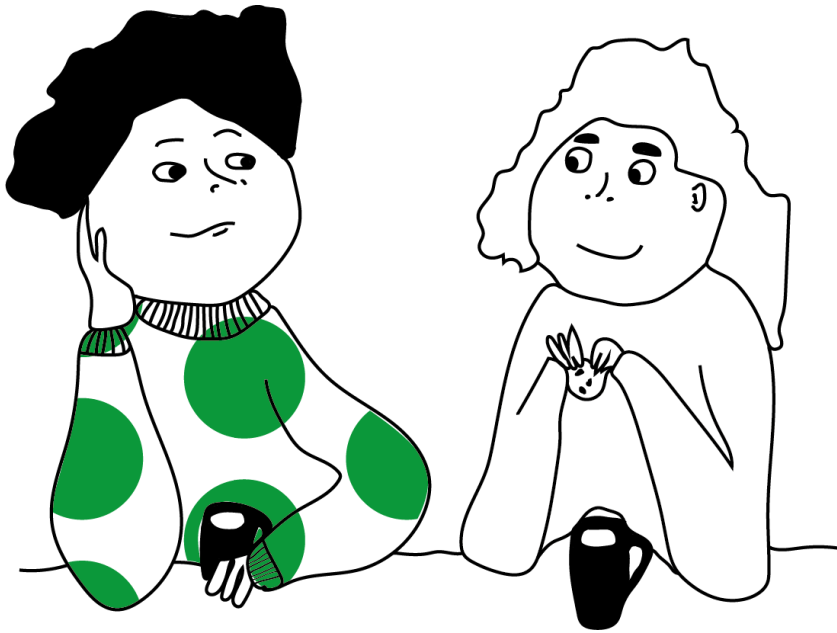
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David Roberts – our Head of Sales. David has nearly two decades of experience in business development and account management, mostly at the Law Society. He has extensive knowledge of marketing in both the charity and legal sectors.

# We'd love to chat!

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If you'd like to find out more about Bequeathed, please get in touch. We're based in London, but we're happy to travel – or to have an initial chat with you over the phone.



**David Roberts**

Head of Sales– Charities

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