

## Legacy giving – the greatest opportunity of a lifetime

Thursday 13 October 2016  
Caledonian Club, London SW1

Timing	Content	Speaker
10.00	Coffee and registration	
10.30	Introduction and objectives	IDPE
10.35	<p><b>Why and how the legacy market place is growing</b> so fast (with a specific focus on the education sector)</p> <p><b>Why do old boys and girls leave legacies?</b> Refining communications to meet the motivations – a debate on the culture of different schools which will include case studies on developing the most inspirational and relevant visions and related communications.</p>	Richard Radcliffe
11.45	Coffee/tea break	
12.00	<p><b>Understanding the prospect journey for legacy prospects for schools</b> This session looks at the touchpoints with schools to maximise the opportunity of keeping the legacy in for a school when Wills are being changed and the differing views of old v young and old girls v old boys.</p> <p><b>Understanding the latest (and sometimes radical) “calls to action” to make sure they do it.</b> This debates the Will (which is mostly but not always essential), how Wills are being made and/or changed and balancing the legal stuff versus the legacy vision of the school.</p>	Richard Radcliffe
13.00	Lunch	
13.45	<p><b>Developing the best communications strategy including</b> how to use (and content of) each channel: legacy-focused events, website content, legacy brochures, annual donor reports, direct mail, telemarketing, internal promotion and the best “legacy voices” for a campaign</p>	Richard Radcliffe
14.55	Coffee/tea break	
15.15	<p><b>How to talk about legacy giving</b> one to one and at events which will include how to ask for legacies, when to ask and who can make the ask.</p> <p><b>How to measure success</b></p>	Richard Radcliffe
16.00	Close	