



Australian Government
Department of the
Prime Minister and Cabinet

BETA

Communication about bequests

Content examples for charities



This slide deck provides examples of different communications approaches to bequests

The purpose of this document is to provide examples of how behavioural concepts can be applied to new or existing communications by charities.

Many charities already engage in different communications campaigns. Often, these charities have a good understanding of who their donors are and whether they are interested in making a charitable bequest. To help these donors follow through with their intentions, charities should consider applying behavioural insights.

Below we incorporate a number of behavioural science concepts into a sample email letter. A similar approach could be used in other formats, such as pamphlets or letters.

Behavioural concepts relevant to bequest communications



Messenger Effects

Something can be more or less salient depending on who spreads the word



Social Norms

Learning about the behaviour of others, especially our peers, can affect our decisions



Salience, Ease & Attractiveness

Making things stand out, easy to do, and appealing, all help to encourage us to follow through with our intentions.



Framing Effects

The way a message is described can change the way we react to it



Present Bias

We overvalue the importance of today relative to a future “tomorrow” and this can lead to procrastination

Peer messenger: living donor

Dear Kim,

In the past, you mentioned you've considered leaving a bequest in your will.

I'm writing to thank you for considering the gift of a bequest, and to share my journey of becoming a bequest donor.

A few years ago, I turned 72 and decided it was time to update my will. I had provided adequate provisions for myself and my children, and I wanted to do something more. The cause of X has always been important to me, and donating to Charity X has been a family tradition of mine.

I decided to leave a small gift of 2% of my estate to Charity X as a small token of my appreciation for their work in our community.

Updating my will was easier and cheaper than I was expecting, which was a pleasant surprise.

I'm proud to be a bequest donor to Charity X, and enjoy the feeling of knowing I've made a difference – and will continue to, well into the future.

First last name
Bequest donor
Charity Name



Personalisation is a powerful tool

Acknowledge **intention** and **thank** them for considering a bequest.

Including a **photo of the messenger** has been an effective method for improving charitable communications

Address concerns about the fact they want to provide for loved ones

Nominate a residual gift, which could also use anchoring so donors have a sense of the average bequest size

Address the misperceptions around the financial and time costs associated with most wills

Emphasise the **warm glow** of giving a bequest to reaffirm the value of leaving one "today"

Peer messenger: donating for a loved one

Dear Kim,

In the past, you mentioned you've considered leaving a bequest in your will.

I'm writing to thank you for considering the gift of a bequest, and to share my journey of becoming a bequest donor.

A few years ago, I turned 72 and decided it was time to update my will. I had provided adequate provisions for myself and my children, and I wanted to do something more. Charity X provided for my husband and our family in our time of need, and this support is something I want to acknowledge in my will.

I decided to leave a small gift of 2% of my estate to Charity X as a small token of my appreciation for their work in our community.

Updating my will was easier and cheaper than I was expecting, which was a pleasant surprise.

I'm proud to be a bequest donor to Charity X, and enjoy the feeling of knowing I've made a difference – and will continue to, well into the future.

First last name
Bequest donor
Charity Name



Personalisation is a powerful tool

Acknowledge **intention** and **thank** them for considering a bequest.

Include a **photo of the messenger and their loved one**

Address concerns about the fact they want to provide for loved ones

Address the **reciprocity** the donor feels toward the charity

Nominate a residual gift, which could also use anchoring so donors have a sense of the average bequest size

Address the misperceptions around the financial and time costs associated with most wills

Emphasise the **warm glow** of giving a bequest to reaffirm the value of leaving one "today"

Social norms: other donors

Dear Kim,

In the past, you mentioned you've considered leaving a bequest in your will.

We appreciate it can be tricky to find the time to make or update your will to include a bequest.

Once they had made adequate provisions for themselves and their children, **many of our donors** chose to leave a small gift of 2% of their estate. We're sincerely grateful for this contribution, and acknowledge the privilege of being a part of someone's legacy.

Not sure where to start?

You can find out more information about making or updating a will (and about how to make provisions to your loved ones, as well as your favourite organisations) through the [ACT Public Trustee](#).

Thank you – every little bit helps.

Charity Name



Personalisation is a powerful tool

Acknowledge **intention**

Acknowledge **barriers**

Address concerns about the fact they want to provide for loved ones

A residual gift is more effective than a nominal one.

Address the **reciprocity** the charity feels toward the other donors and their "legacy"

Make it easy to find further information and increase the likelihood of follow-through

Reciprocity statements such as "every little bit helps" have been used on other trials on improving communications in philanthropic giving

Framing effects: “planning for the future”

Dear Kim, _____

In the past, you mentioned you’ve considered leaving a bequest in your will. _____

We appreciate it can be tricky to find the time to make or update your Will to include a bequest.

Keeping an up-to-date Will is important for a number of reasons:

- It ensures your loved ones are provided for
- It helps organise your estate in accordance with your wishes,
- If you intend to leave a bequest, it makes it more likely that the organisations you’re passionate about are part of your legacy.



Not sure where to start?

You can find out more information about making or updating a Will (and about how to make provisions to your loved ones, as well as your favourite organisations) through the [ACT Public Trustee](#).

Thank you – every little bit helps. _____

Charity Name _____

Personalisation is a powerful tool

Acknowledge **intention**

Acknowledge **barriers**

Make salient the benefits to having an up-to-date Will for the individual, their family, and the charity.

Make it easy to find further information and increase the likelihood of follow-through

Reciprocity statements such as “every little bit helps” have been used on other trials on improving communications in philanthropic giving

Present bias: planning prompts

Dear Kim,

In the past, you mentioned you've considered leaving a bequest in your will.

We appreciate it can be tricky to find the time to make or update your will to include a bequest.

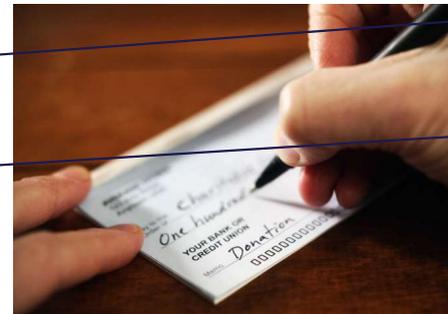
If you're still interested, you can [click here](#) to set a calendar reminder and we'll send you an email in two weeks' time to see how things are going.

Not sure where to start?

You can find out more information about making or updating a Will (and about how to make provisions to your loved ones, as well as your favourite organisations) through the [ACT Public Trustee](#).

Thank you – every little bit helps.

Charity Name



Personalisation is a powerful tool

Acknowledge **intention**

Acknowledge **barriers**

Opt-in for reminders/prompts. Use of self-nominated commitments can help close intention-action gaps,

Make it easy to find further information and increase the likelihood of follow-through

Reciprocity statements such as “every little bit helps” have been used on other trials on improving communications in philanthropic giving