

Tomorrow's World

An exclusive in person Gifts in Wills masterclass

Legacy
Futures



With Dr Claire Routley, Ashley Rowthorn
and guest speaker Alan Clayton

REGISTER NOW

19-21 FEBRUARY 2024
The Inch Hotel, Loch Ness



Every gifts in wills fundraiser is aware of the huge opportunity that the forthcoming wealth transfer will offer, and the benefits it can bring, both for our supporters and the causes that they care about. We also all know that long-term investment in our gifts in wills programme is essential, but, increasingly, we will need to develop those programmes in a never-normal world, categorized by rapid social, environmental and technological change.

This event, for senior gifts in wills fundraisers, is an opportunity to for us to step away from the day-to-day and lift our focus to the future, to reflect on what this changing society means for our work, in the company of other highly strategic thinkers.

During our time together we will explore the key long-term trends that are affecting society and consider what those trends mean for our gifts in wills and indeed our wider organizational strategy.

You will leave inspired by the potential for the future, and equipped with the tools that you need to develop a strategy aligned to the challenges of the next decade.



This masterclass was brilliant and I would highly recommend it to anyone who views legacies as an important part of their income portfolio. I have come away with a greater degree of insight and some clear actions to take, which I know will improve our performance and the experience of our donors. We came away with a renewed vigour and even more passion for our work.

Claire Irving
Director of Income Generation and Marketing
St Catherine's Hospice



To book, contact:

Claire Truswell

claire.truswell@legacyfutures.com

Cost:

£1995 plus VAT.

Including masterclass, two nights accommodation, full board and transfers from Inverness Airport or train station.

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We will explore

- How society is radically changing as a result of the Third Industrial Revolution
- The changing face of legacy donors as the Baby Boomers create the anticipated Legacy Boom
- How we will need to adapt and respond to donors' needs, values and behaviours
- The implications of a changing environment for our colleagues and our wider organisation

What you will learn

- How to ensure your strategy stays relevant for the long-term
- How to stay motivated and avoid burnout in a never-normal world
- Tools and techniques to make clear decisions on your future direction
- How to communicate the need for strategic change to the wider organisation

Learning style

The content of the seminar is formed by a unique mix of academic and market research, practical examples and case studies. It will be

highly interactive and a chance to learn from and reflect with experienced peers from the UK and overseas.

Who should attend?

You are not necessarily a legacy fundraiser but you are a leader. This masterclass is suitable for legacy managers, individual giving managers, directors of fundraising, communication managers and chief executives alike. Anyone looking to prepare their organisation for legacy growth or to see a step change in their legacy income.

When?

19-21 February 2024

The seminar begins at 13:00 on Monday 19th February and finishes at 13:00 on Wednesday 21st February 2024. Please plan to arrive on the morning of the 19th, or talk to us if you need to arrive on the evening of the night before.

Your attendance fee covers all sessions, as well as seminar materials, accommodation, food, and your transfer from Inverness Airport or train station.

The Inch Hotel, Loch Ness

The Inch, with its gorgeous location overlooking Scotland's most famous loch, is a place of inspiration, perspective and energy. It is a perfect retreat from the hustle and bustle of daily life to enable you to focus on growing your organisation. To find out more visit inchhotel.com



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Meet the speakers

Ashley Rowthorn



Ashley Rowthorn is CEO at Legacy Futures, a group of consultancies helping charities grow with legacy giving. Together they work with over 250 charities across the UK, Europe and

Australia, through research, benchmarking, consultancy and estate administration.

Ashley has spent the last 15 years immersed in legacy giving. Ashley started in a regional role, having legacy conversations in the community, and went on to manage legacy marketing campaigns at a leading national health charity. His desire to help charities raise more money from legacy giving inspired him to found a specialist fundraising consultancy, over the past 8 years working with a wide range of causes throughout the UK and internationally.

Dr Claire Routley



Dr Claire Routley has worked in fundraising for over twenty years. Having worked in-house for a number of charities, she is now Head of Consultancy at Legacy Futures, and keeps

a foot in the academic world at the University of Kent's Centre for Philanthropy. She completed her PhD looking at why people leave legacies to charity in 2011 and since then has published and spoken on the topic internationally. She is co-author of the best-selling book, *Fundraising Strategy*, published by the DSC and co-editor of *Legacy and In-Memory Fundraising*.

Guest speaker

Alan Clayton, CEO Revolutionise



Alan has a twenty-five-year career in purpose driven growth behind him and is still speeding up. He trained as a scientist but has always worked in the creative

field, so he can combine precise analytics with emotional energy to create ideas which lead to great change. He is a serial entrepreneur and has worked in more than thirty countries. Clients range from global giants such as UN agencies right through to small, local start-ups, and from business leaders to freelancers.



I had been looking for a legacy-specific fundraising course for some time, and this masterclass exceeded my expectations. The speakers were experts in the field, and the sessions were all relevant and inspiring. I came away excited to revamp our legacy programme, with lots of evidence-based ideas, and a practical understanding of how to put those ideas into practice. Great value for money, and I would heartily recommend to anyone looking to further their understanding of legacy fundraising.

Alice Sockett

Legacies and In Memoriam Gifts Development
Cardiff University



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