

# FIA Conference 2024

Where **passion**  
meets **purpose**

Brisbane  
28 Feb – 1 Mar

FIA

CONFERENCE

# Key Insights from 36,000 Online Wills

GIFTS IN WILLS TRACK

LUCY MCMORRON & REBECCA STALENBERG

GATHERED HERE & MS PLUS



Gifts in Wills Track  
Sponsored By:



# Today's agenda

**01**

Introduction

**02**

Analysis of 36,000  
online wills

**03**

Stewardship insight,  
with MS Plus

**04**

Key learnings

**05**

Q&A



**SCAN ME!**

# Nice to Meet You!



## Lucy McMorron

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- Head of Partner Success, Gathered Here
- 20+ years experience within charities and nonprofits
- Former Head of Social Enterprise, Head Marketing and Fundraising, Kids Under Cover

# About Gathered Here

- 40,000+ wills written since 2020
- An estimated \$550 million in bequests
- Over 2,500 five-star reviews
- Meaningful insights into individual gifts, donor demographics, and campaign success
- 480+ partners, including charities, non-profits, foundations, sporting clubs, performing arts centres, schools, and universities.



# Trusted by 480+ charities and NFPs, including...

## Animal & wildlife



## Children



## Education



## Climate & environment



## International & humanitarian



## Community & social services



## Health & disability



## Arts & culture



## Sporting



2024

 gatheredhere  
FREE ONLINE WILLS

# Gifts in Wills Report

The largest analysis of online wills ever conducted in Australia.



Over 36,000 wills analysed

# Gifts in Wills Report 2024



**36,274** wills over three years



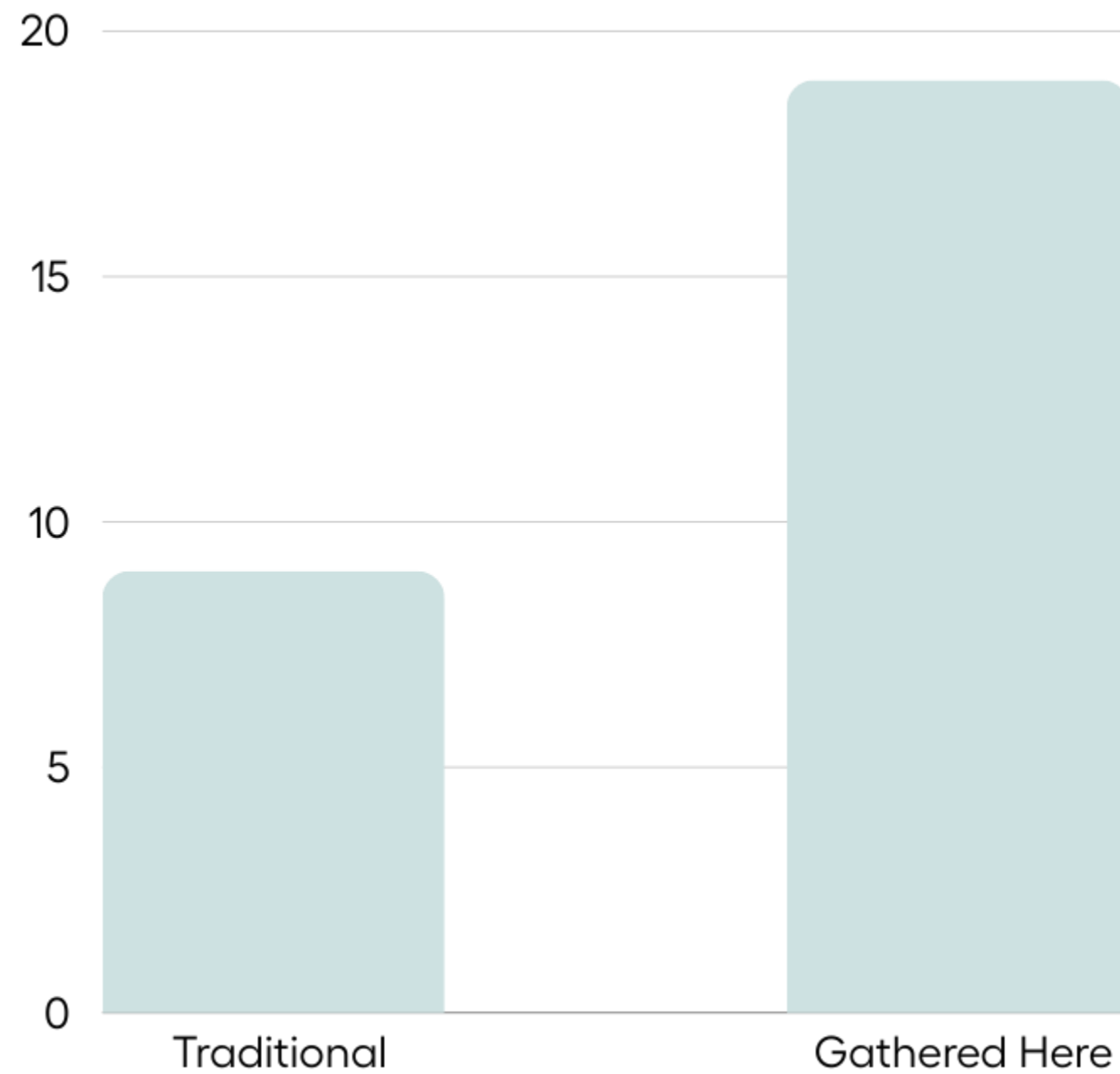
**\$442** million in bequests

- November 1, 2020 - October 31, 2023
- Trends across age, location, family structure, cause area and more...



SCAN ME

## % of wills that include a gift



Online wills are more than twice as likely to include a gift, compared to traditional wills





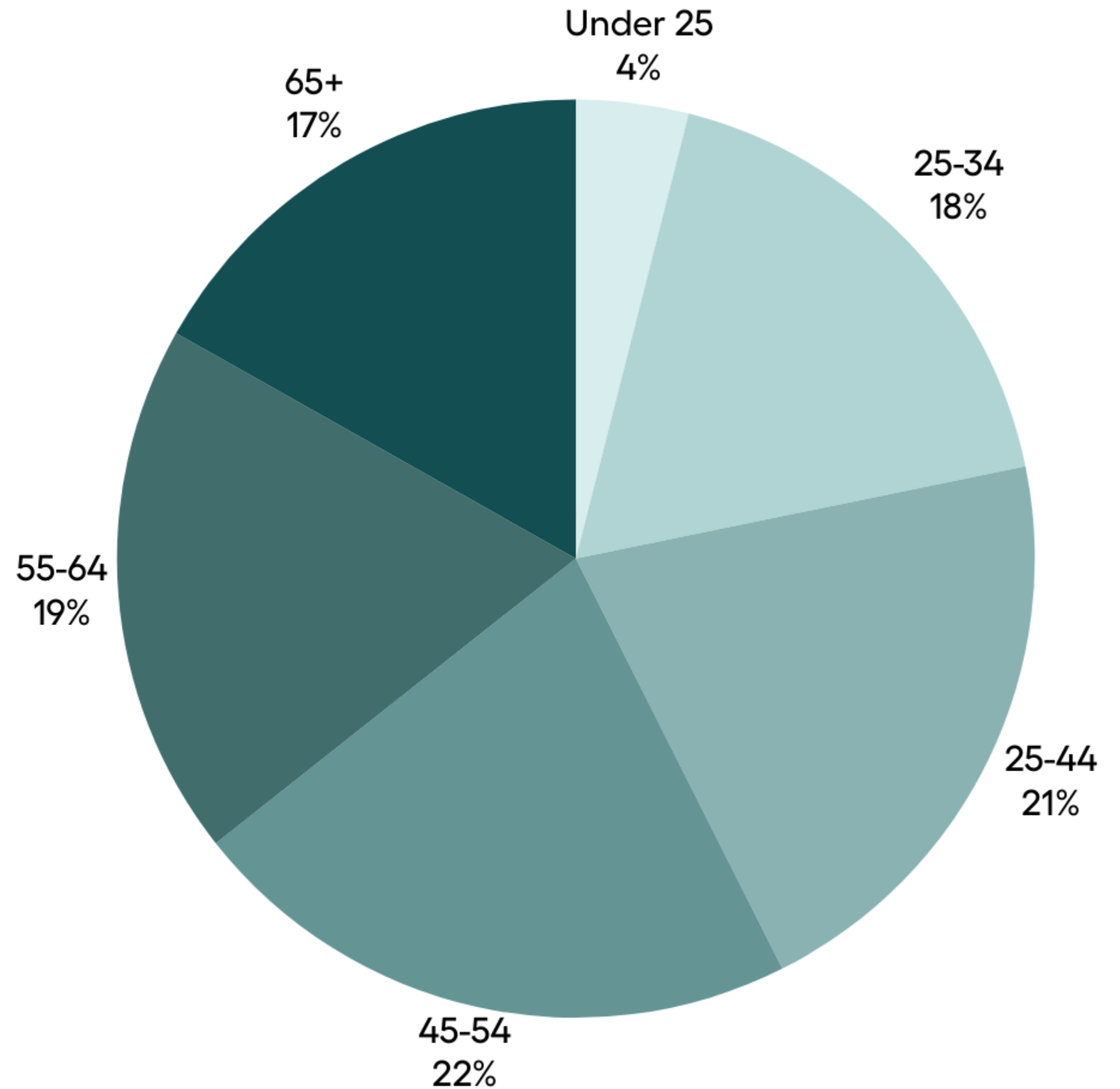
## Most wills are written by 45-54 year olds

**55+**

36% of will-writers are 55+

**65+**

17% of will-writers are 65+



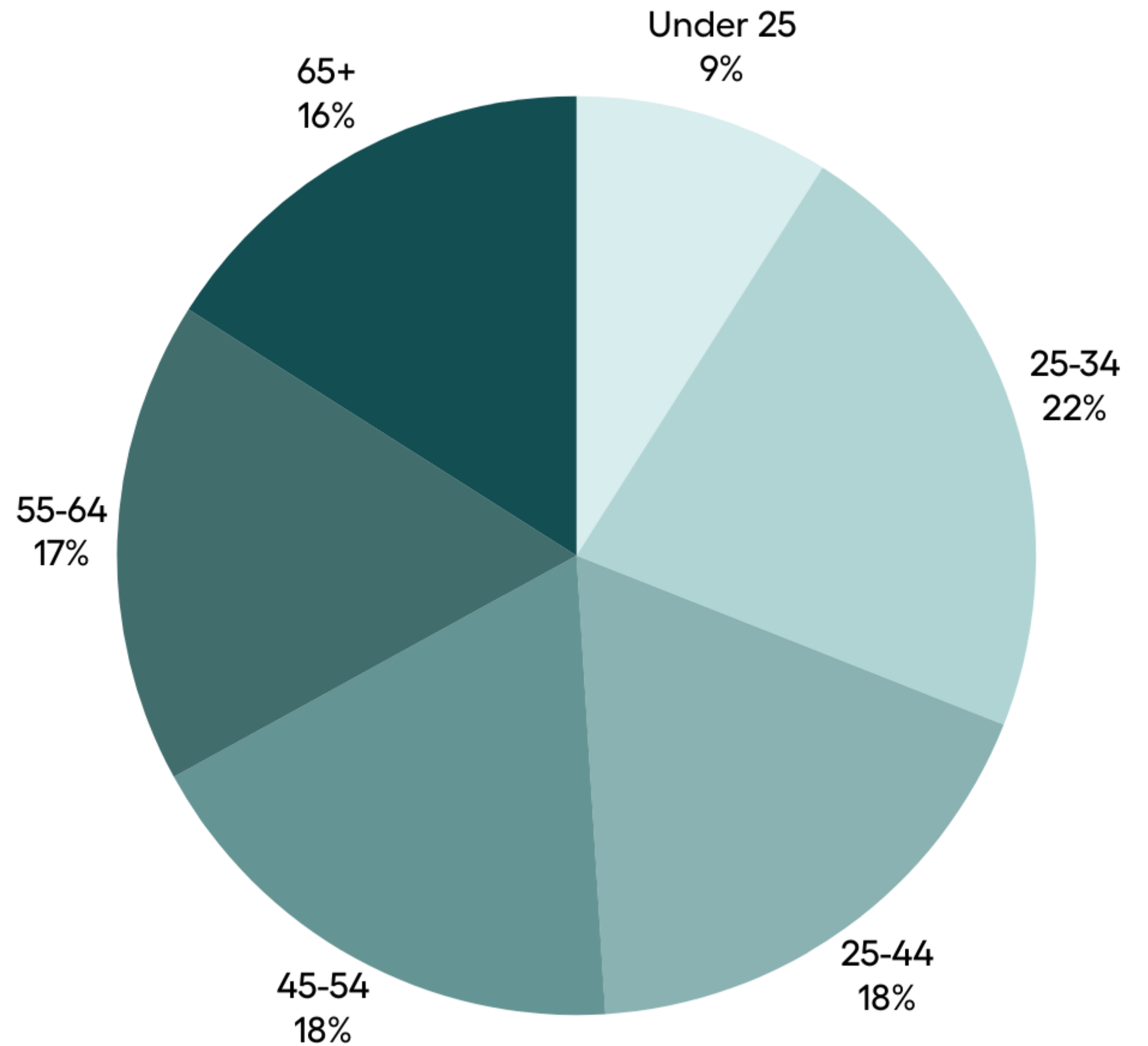
## Average supporter is aged 48

**65+**

16% of supporters are 65+

**18%**

of supporters were 65+ in 2022-23



**65+**

5% of supporters are 75+

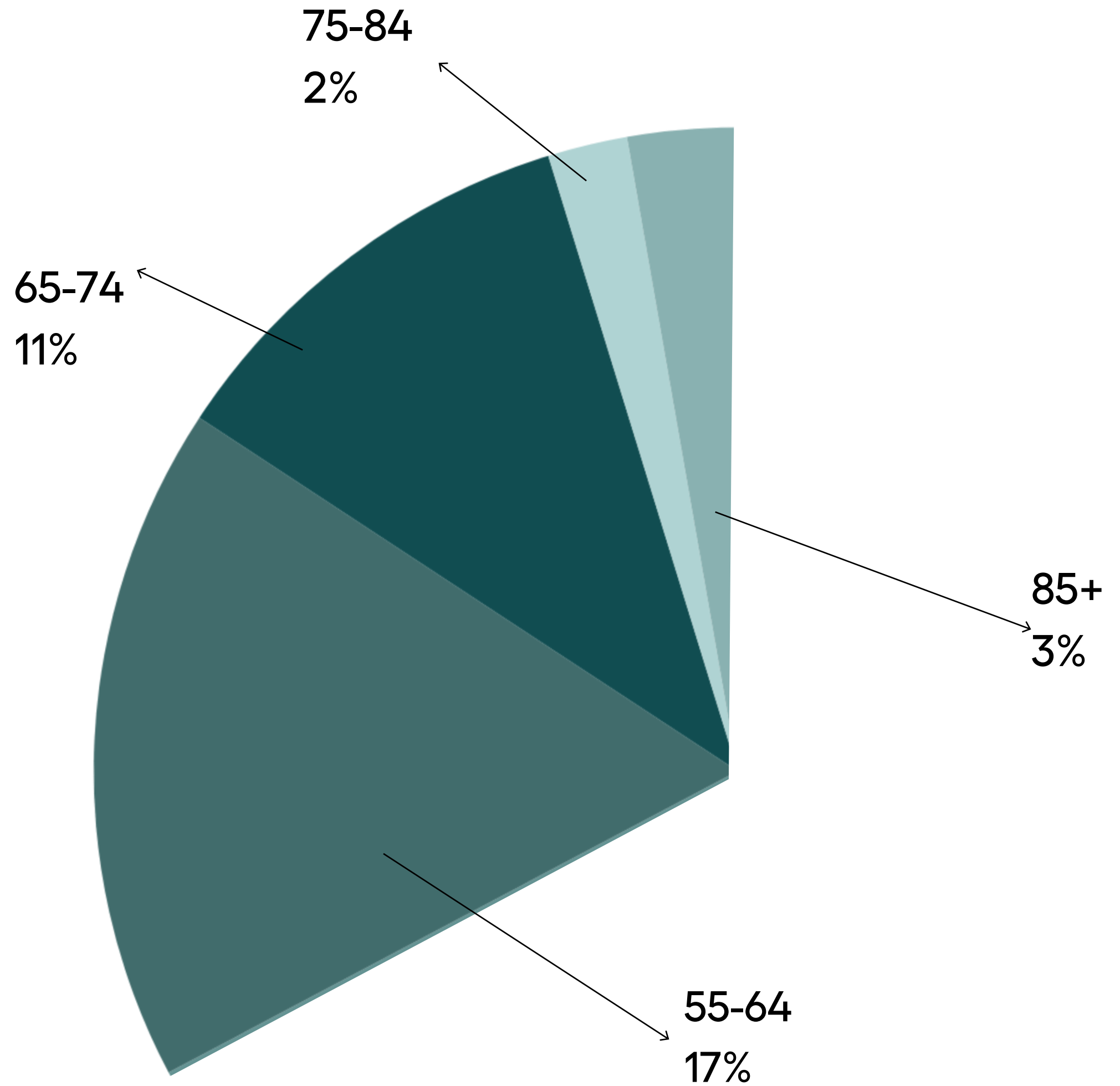
**85+**

3% of supporters are 85+



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Learn more about giving trends in older Australians

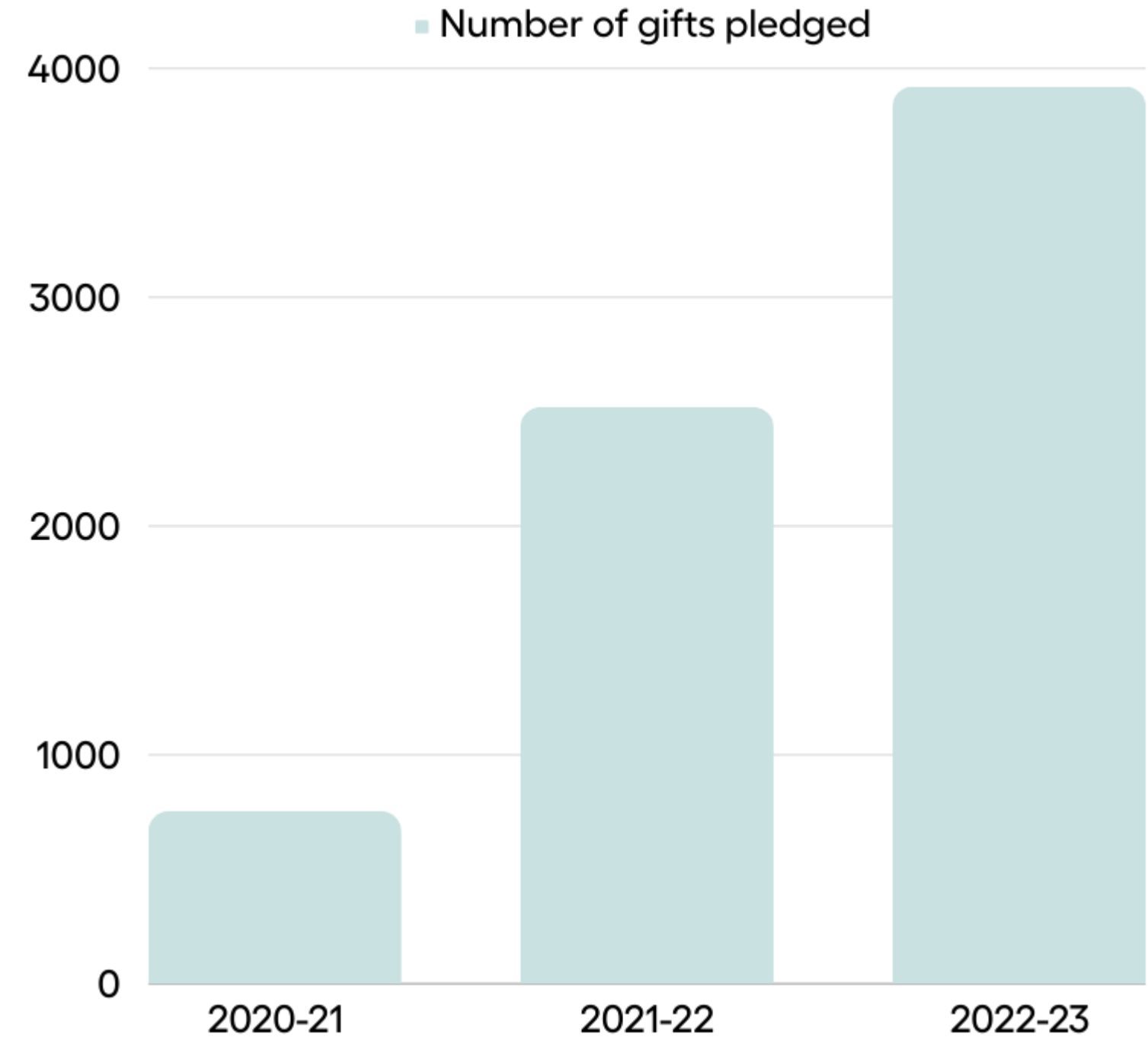


**\$442m**  
over three years

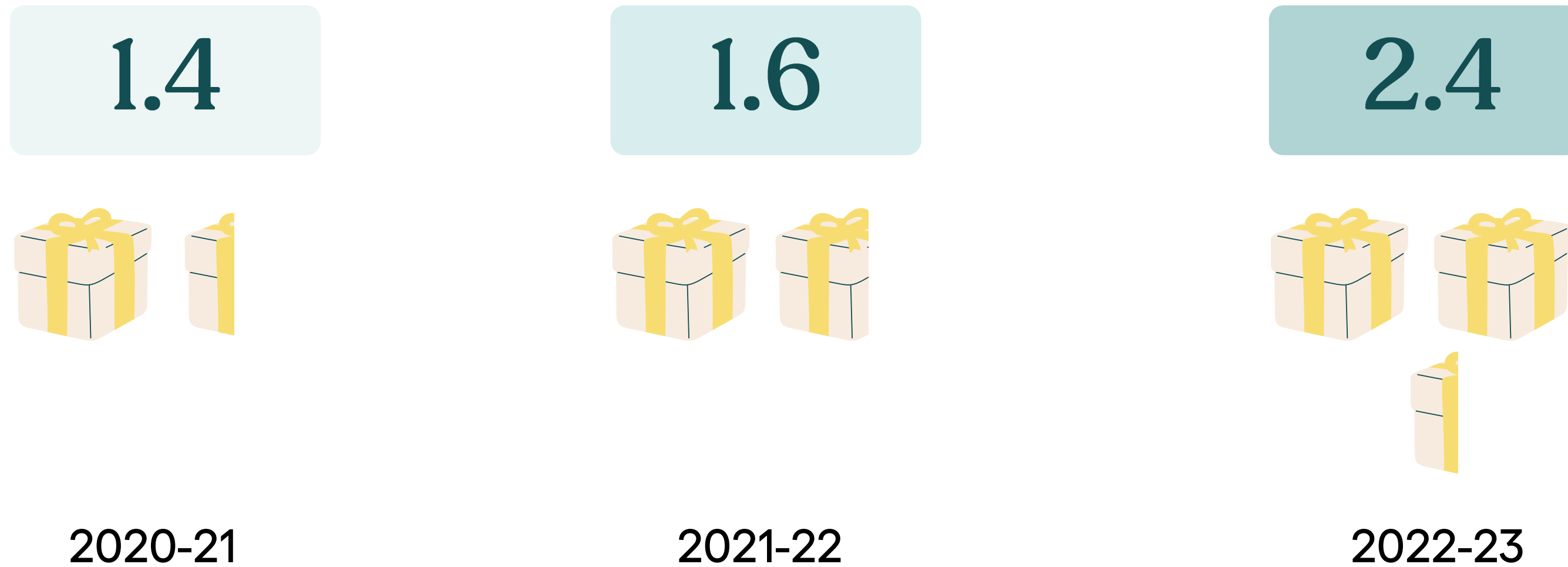
**\$58,262**  
average gift value

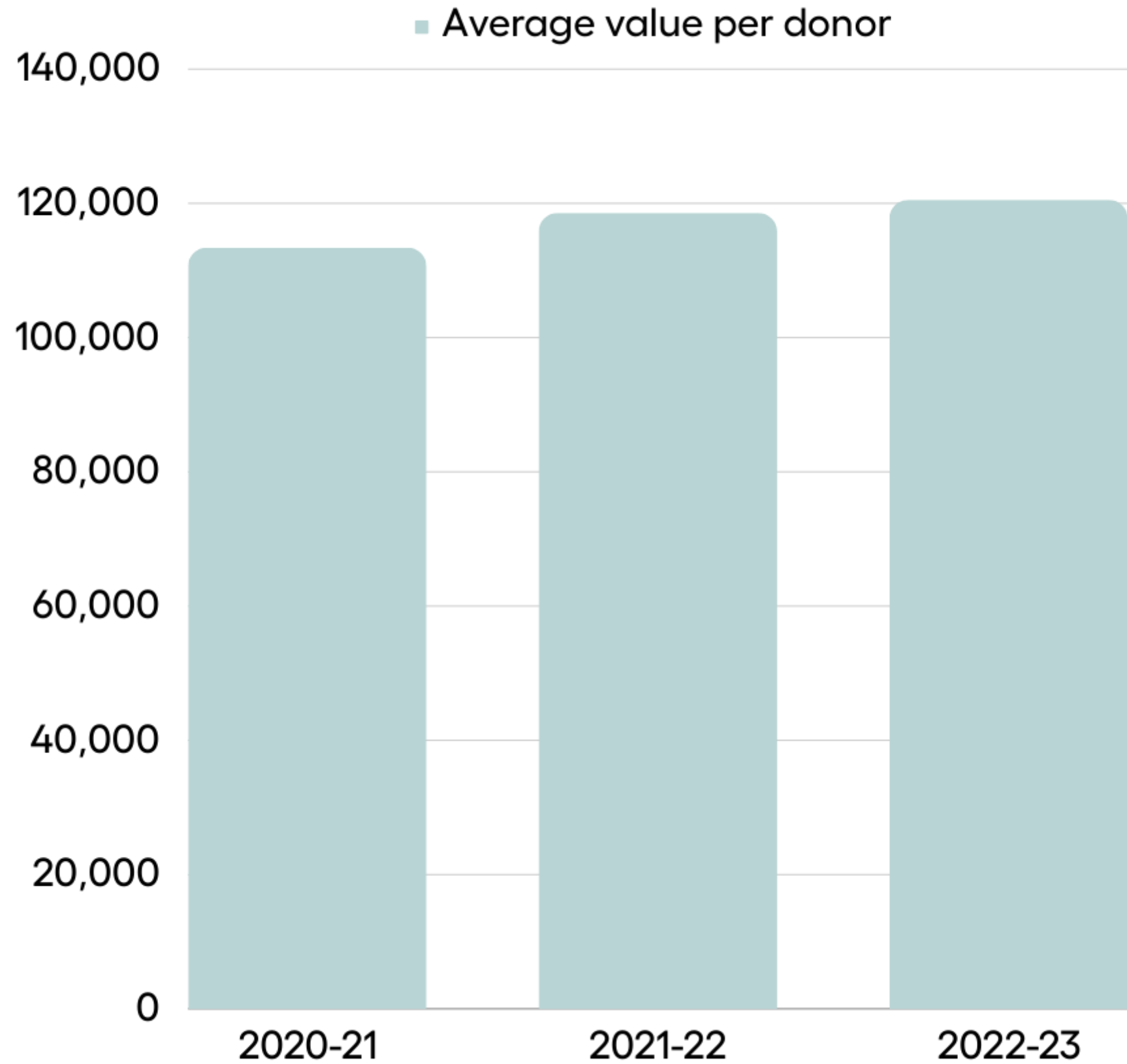
**421%**

↑ increase in gifts pledged from  
2020-21 to 2022-23



# Average number of gifts pledged per gifter





**5%**  
↑ increase from 2020-21  
to 2022-23

**6%**  
↑ increase from 2021-22  
to 2022-23

This change  
is driven by  
technology

https://will.gatheredhere.com.au

The Animal Protection Society

The Animal Protection Society is proud to partner with Gathered Here to offer you the opportunity to write your Will for free (plus free & unlimited updates of your Will for life).

### 3. Estate

What causes do you care about? (Optional)

We are able to offer this Will to you for free due to the support of charities that are dedicated to making Australia and the World a better place.

While many people choose to leave a small percentage of their estate to charity, it's completely up to you.

Will you consider leaving a gift to help a cause that is meaningful to you?

**Support 3 Charities**

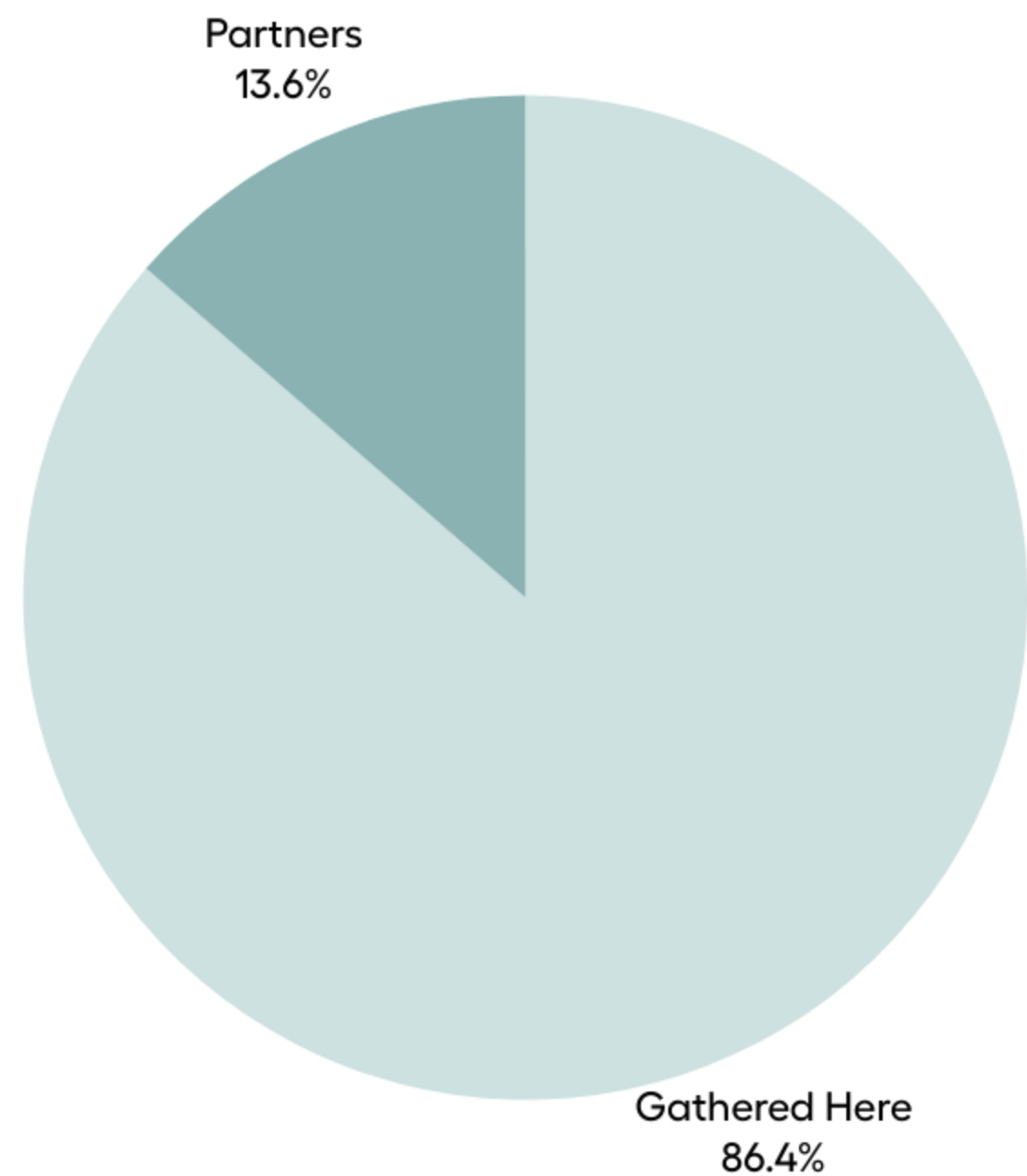
- Animal Protection Society
- Pet Adoption Club
- Wild Animal Protection

**Support a group of Charities**

- Animals & Wildlife**  
Support 4 partners
- Children**  
Support 3 partners
- Health & Research**  
Support 4 partners
- Environment**  
Support 4 partners

86%

of wills are written by independent users





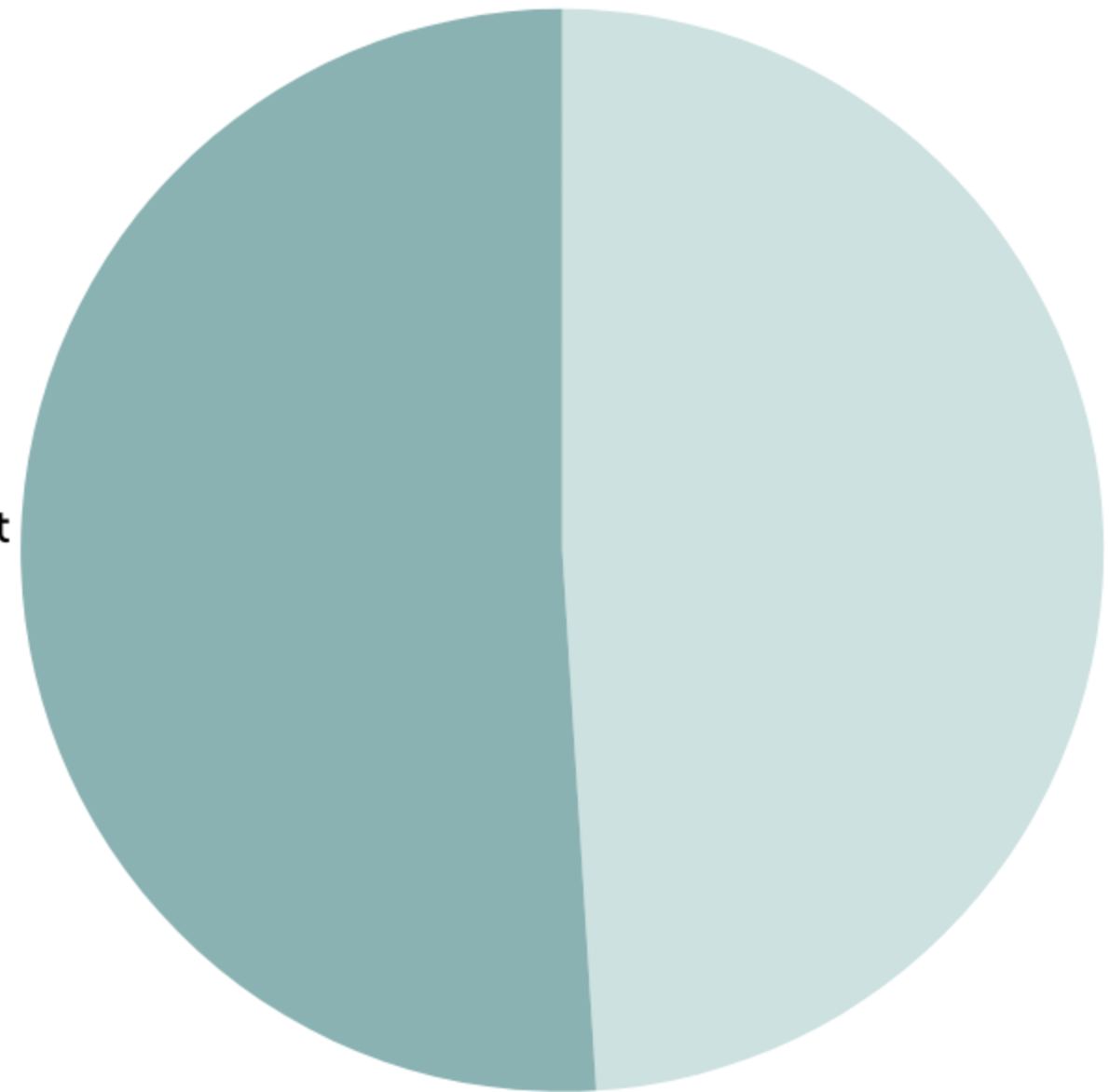


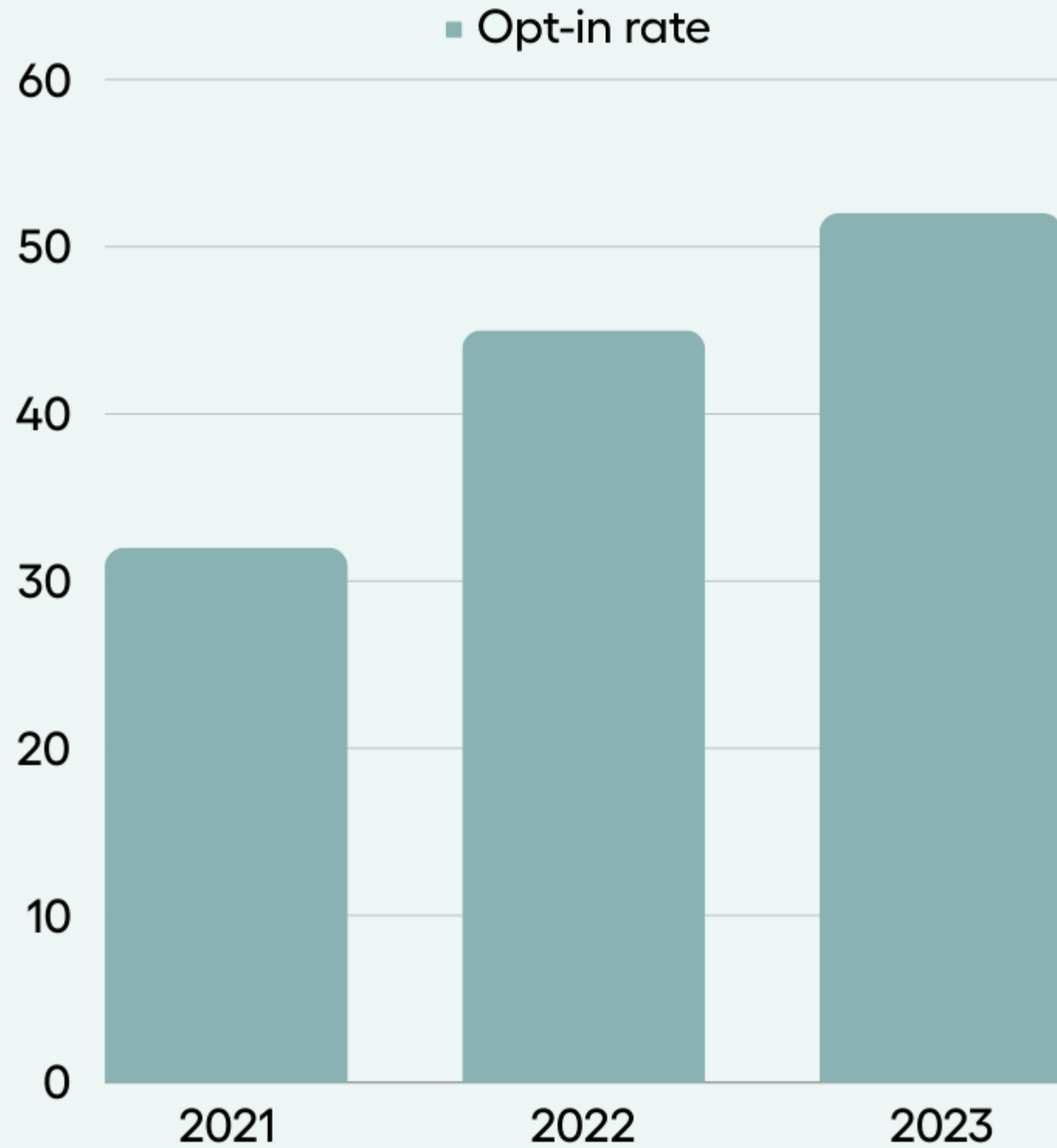
**49%**

of Group Listing givers share their contact information

Opt-out  
51%

Opt-in  
49%





● In 2022-23

# 52%

of givers shared their contact information with the organisations they supported

## 6. Thank you

Will you make the work of nonprofits easier by sharing the details of your gift?

Anonymous gifts are less helpful to nonprofits as they often cannot be included in planned giving goals.

YES

NO

Next

< Back

# Donor stewardship

with Rebecca Stalenberg,  
Gift in Will Manager at



- Fully qualified, practicing Solicitor
- Gift in Wills Manager, MS Plus
- 25+ years legal experience





RESEARCH  
ADVOCACY  
CURE

Support & services for those living with Multiple Sclerosis (“MS”) in New South Wales, the ACT, Victoria and Tasmania.

Separate statewide programs are run by:



MS Queensland



MS Society SA & NT



MSWA

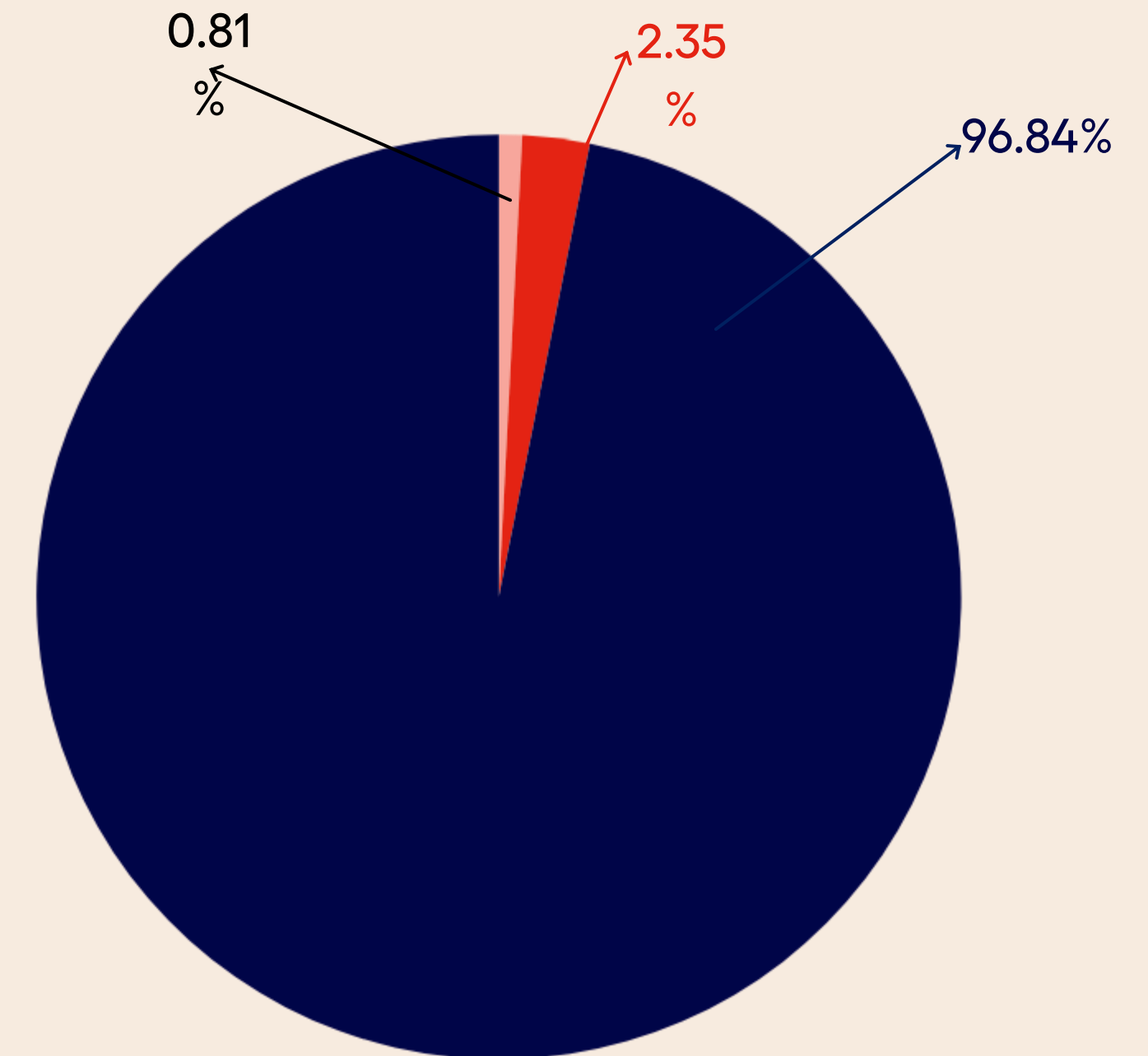
# The success of “traditional” Wills

For over 65 years, the MS entities have been supporting those living with MS.

Our Gift in Will program, has brought in over \$25m + in the last 10 years

**Since mid 2021 our presence in Online Wills has surged.**

- MS Plus aka Multiple Sclerosis Limited (Vic, Tas, NSW, ACT)
- MSA aka Multiple Sclerosis Australia aka MS Australia
- MSRA aka MS Research Australia aka Multiple Sclerosis Research Australia



Online Wills (100+ Gathered Here, approx 15 Wills on other Platforms)

# Our landing page

**MS PLUS** Write your Will for free - help us fast track a cure for MS today. Write My Will for Free

## Protect future generations from MS with a gift in your Will.

Thousands of Australians live each day with a neurological condition. MS Plus (formerly Multiple Sclerosis Ltd) is one of Australia's leading sources of information, advice and support.

We play an enormous role in our work to face the challenges of multiple sclerosis (MS) and help retain the dreams of those affected by similar conditions.

**MS PLUS**

**Gifts** ✓

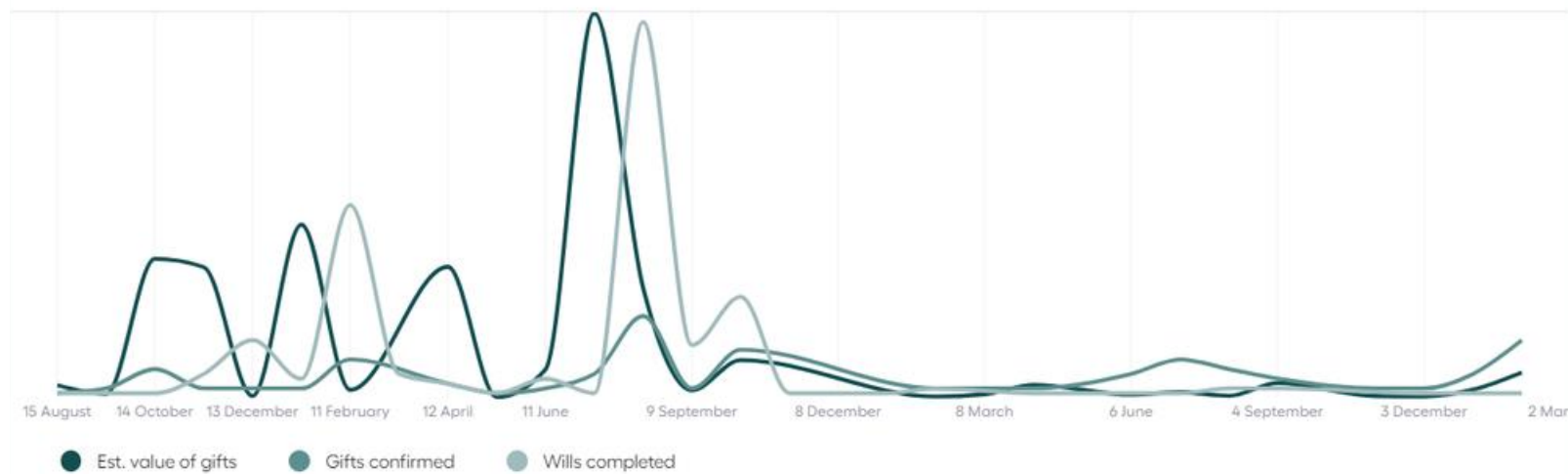
<b>MS PLUS</b>	10%
Mia Smith	90%

# Gathered Here confirmed Gifts In Wills

## Partner Account



Estimated value	Accounts	Wills	Gifts	Avg. Gift Value
\$6,403,963.06	266	156	113	\$59,295.95

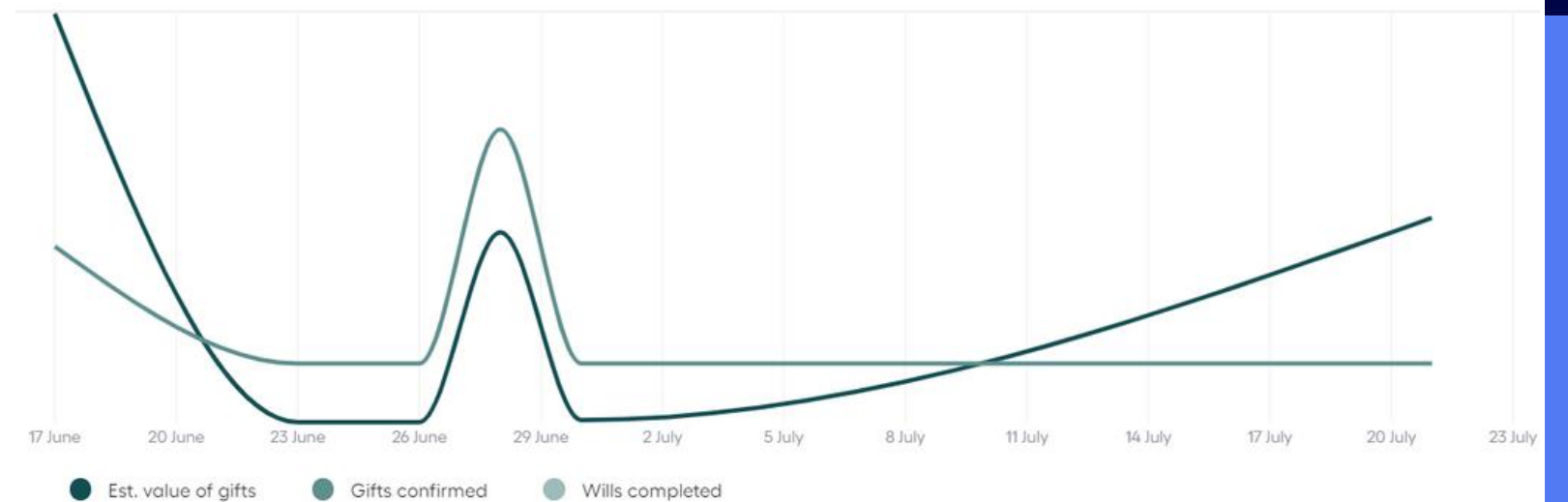


Mix of EDM, links sent and “Featured Listings”  
Both active and passive lead generation

## Free Account



Estimated value	Accounts	Wills	Gifts	Avg. Gift Value
\$2,613,997.50	4	1	12	\$217,833.13



All found as a “Featured Listing”  
only passive lead generation



Write your Will for free - help us fast track a cure for MS today.

Write My Will for Free

Support MS Plus Ltd (formerly Multiple Sclerosis Limited)



### Overview

Estimated value

\$6,305,220.45

Accounts

265

Wills

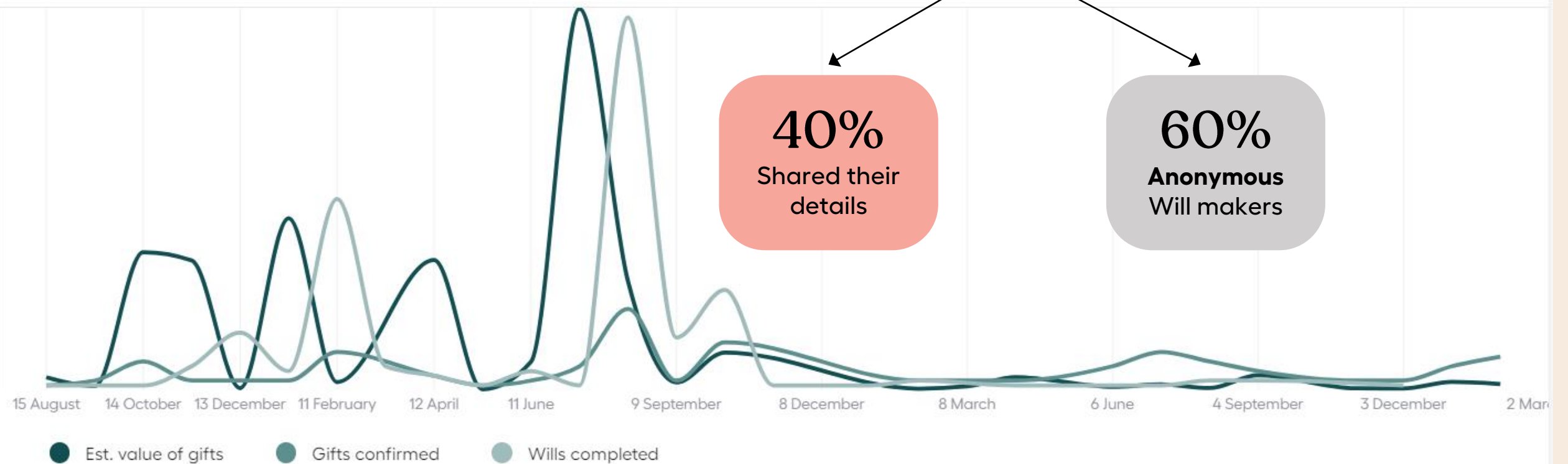
155

Gifts

108

Avg. Gift Value

\$61,215.73



40%

Shared their details

48%

Known to MS

52%

Unknown

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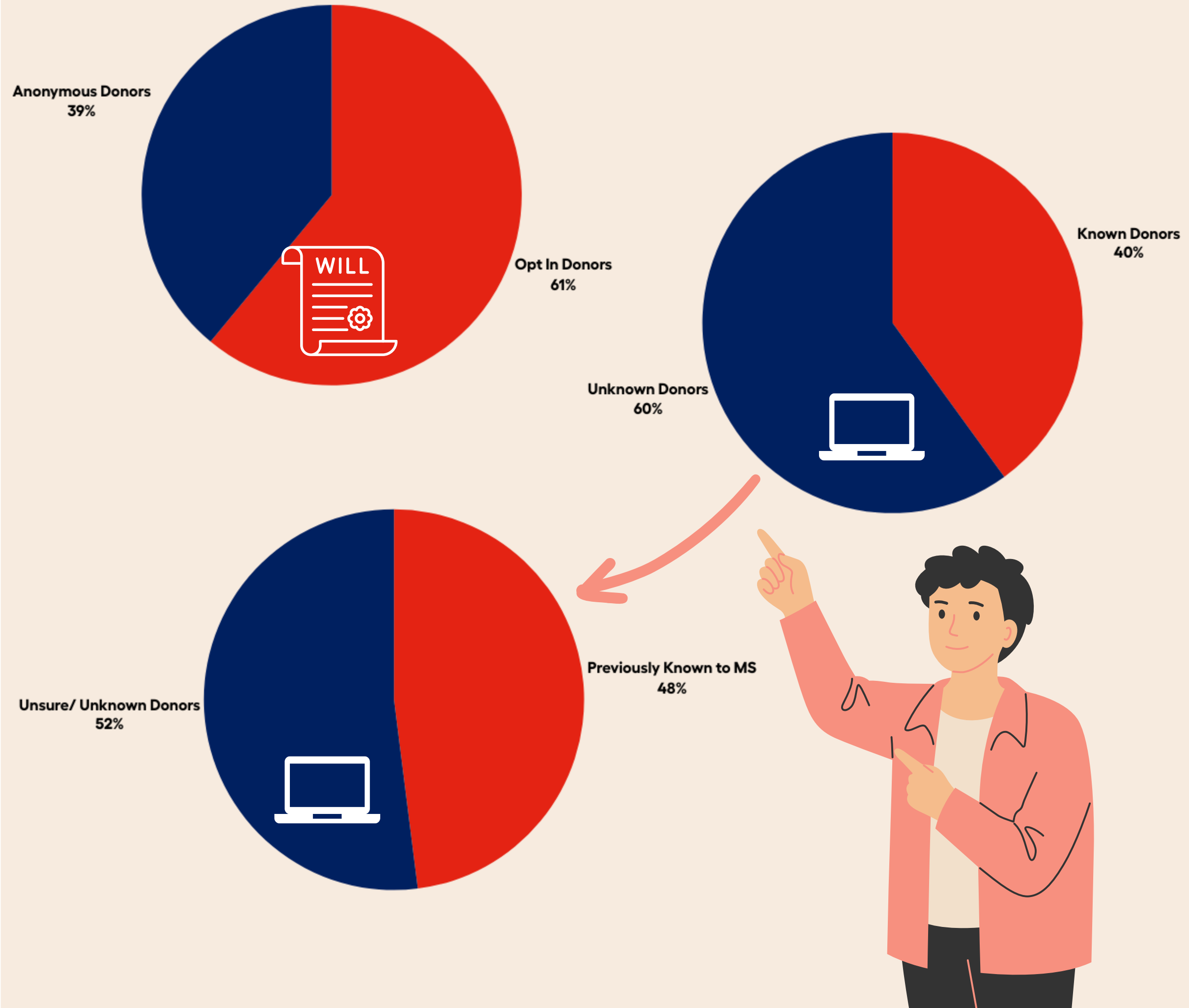
# Benefactors that are known and unknown to us:

## ● Traditional Estates:

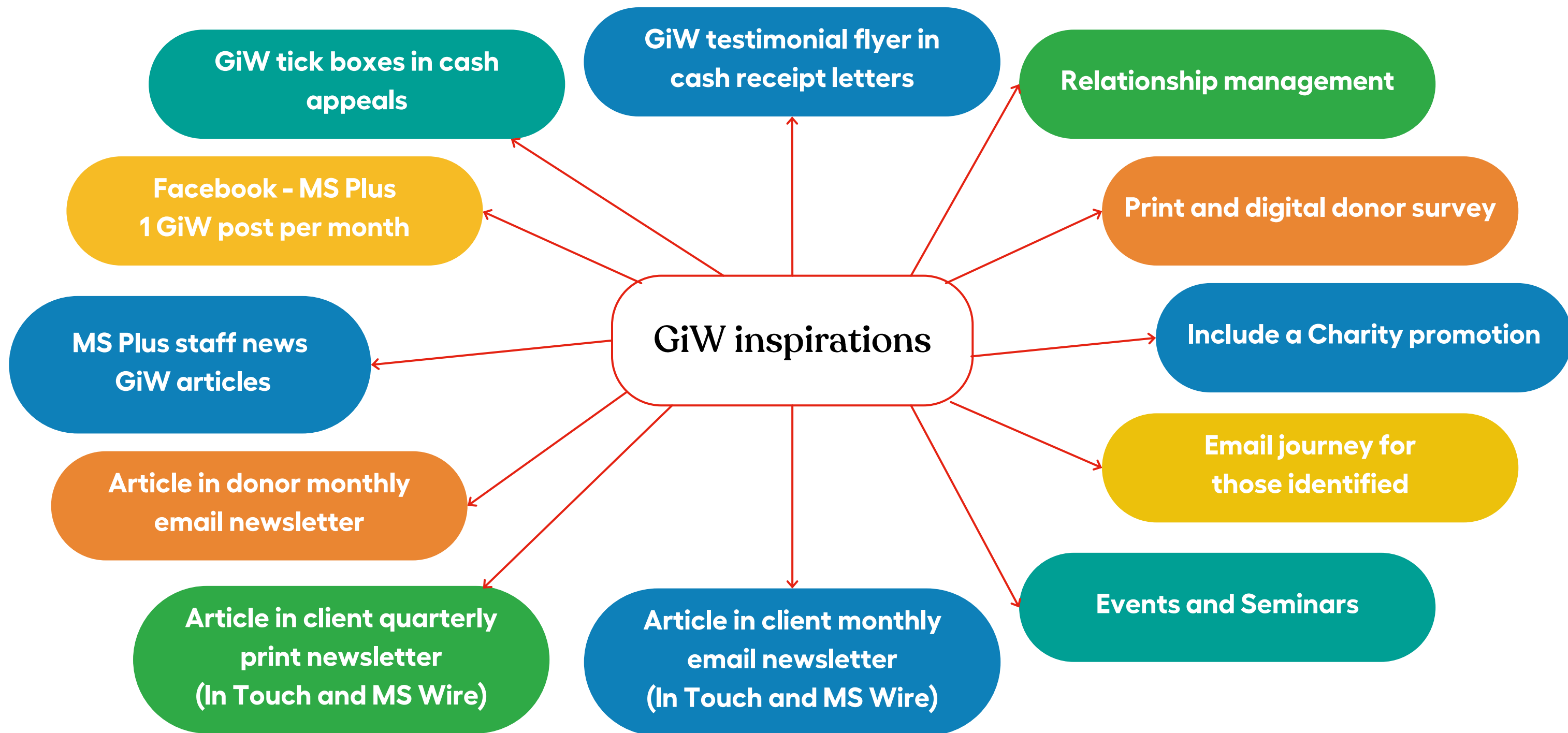
- Known Donors (61%)
- Unknown Donors (39%)

## ● Online Wills:

- Anonymous Donors (60%)
- + Details shared with us (40%)
  - Known Donors (48%)
  - Previously Unknown (52%)



# Traditional Stewardship process



# Best Practise Donor Engagement

- For most people, **a concise, impact-focused communication a few times a year would be enough to keep them engaged and remind them of the importance of their support**
- Customers do want to **hear from the beneficiaries** and the impact of their donation.
- Customers do want to **hear from the beneficiaries Stories are valued and remembered** – seeing the impact/issues or outcomes of the work.

Data capture single CRM		Data analysis past to inform future		Data reporting to inform and improve results			
Prospects		Considerers		Intenders		Pledgers/Benefactors	
Acquisition		Surveys		Surveys		Surveys	
Surveys		Storytelling		Storytelling		Reconfirming contact	
Story telling		Impact reporting		Impact reporting		Gratitude + Impact reporting	
Multimedia MM		Personalised contact + MM		Personalised contact + MM		Personal contact + MM	

# Personalised Stewardship & Engagement

## ● 6 standard touchpoints:

- Welcome – letter, phone call, email, survey
- Preference form reach out
- **Stewardship email journey**
- Monthly EDM updates and shared stories (Can be reduced)
- **Cards Birthday/Christmas**

## + Reports

- Annual report
- Impact report
- MS + You

## ● If Callistemon League Members (Confirmed Benefactors):

- Share your story EDMs and shoutouts
- Invitation to stewardship events
- Celebration of Life - Online Book
- “VIP” Area at Events

## ● If Appeal donors:

- Testimonials (through tax receipts)
- Thank you, card and personalised message, on tax receipts

## ● Online Lead Generation

- Gathered Here Will link/ Info
  - Downloadable “**Guides**”
  - NEW Integrated Survey & Journey
  - Advocacy “Petitions” via share details links
- + Once replied – then opt in for:
- Survey – Leads - Nurture
  - “Fast Track a Cure” journey
  - “Wellbeing” services journey
  - OR A mix of two – if no pref



# Inspiring & rewarding journeys

**Email:** tailored personalised emails based on survey response answers – over 4 ½ years building engagement & traction.

**Print:** personalised, bespoke handwritten cards using Artwork designs, submitted by our MS Plus clients, to show value to users.

**Telemarketing:** personal thank you calls and Birthday calls.

**Social:** content shared via Facebook, YouTube channel and “Include a Charity” exposure.

**Online Wills:** making a free online Will available to our supporters.

**Events:** physical and now planned hybrid-digital events.

# Celebrate, Nurture, and Recognise

**MS PLUS**

**Fast-track to a cure for MS. Care until we're there.**  
Protect future generations from MS with a gift in your Will.

**MS PLUS**

**Celebration of Life**  
An eternal thanks to our MS Heroes

**MS PLUS**  
Neuro Wellbeing

**A Mother's love and legacy**

Dear Valued supporter,

**MS PLUS**  
Neuro Wellbeing

**A legacy of compassion and courage**

Dear Bob,

**MS PLUS**  
Neuro Wellbeing

**A visionary, whose kindness lives on**

Dear Valued supporter,

I am writing to express my gratitude for your loving care towards people living with multiple sclerosis (MS). Your kindness and generosity, including your future planning via a gift in your Will, is key to the provision of vital support for people living with MS. It will give many people best possible quality of life.

**MS PLUS**

**MS Callistemon League**  
Meet others like you who are helping to fast-track a cure for MS

**MS PLUS**

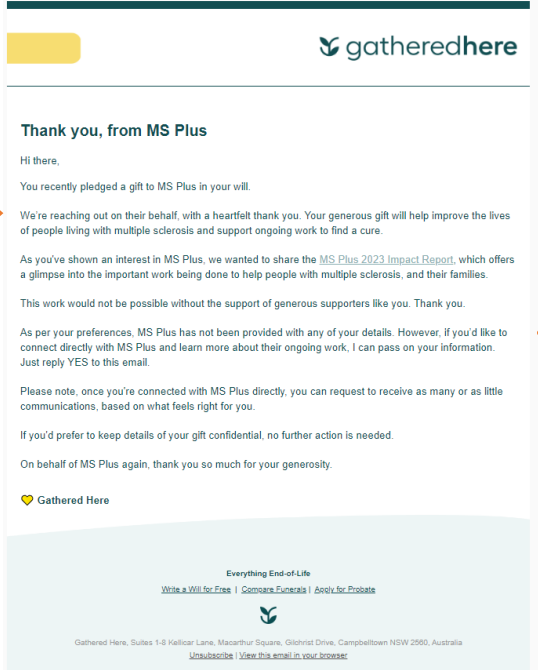
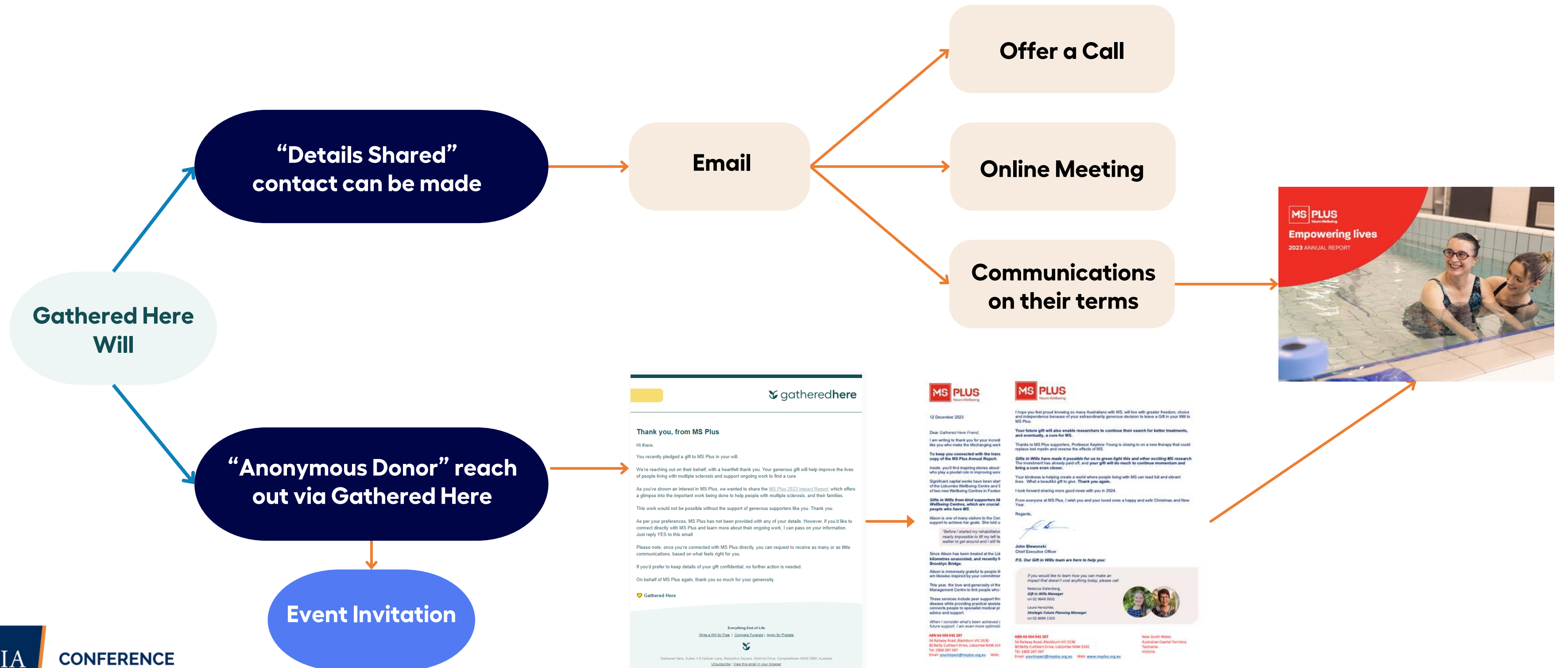
**A friendly guide**  
Essential information on how to fast-track a cure by leaving a gift for MS research in your Will.

**MS PLUS**

**Please include a gift for MS Plus in my Will.**



# Nurturing while honouring preferences



## Thank you, from MS Plus

Hi there,

You recently pledged a gift to MS Plus in your will.

We're reaching out on their behalf, with a heartfelt thank you. Your generous gift will help improve the lives of people living with multiple sclerosis and support ongoing work to find a cure.

As you've shown an interest in MS Plus, we wanted to share the [MS Plus 2023 Impact Report](#), which offers a glimpse into the important work being done to help people with multiple sclerosis, and their families.

This work would not be possible without the support of generous supporters like you. Thank you.

As per your preferences, MS Plus has not been provided with any of your details. However, if you'd like to connect directly with MS Plus and learn more about their ongoing work, I can pass on your information. Just reply YES to this email.

Please note, once you're connected with MS Plus directly, you can request to receive as many or as little communications, based on what feels right for you.

If you'd prefer to keep details of your gift confidential, no further action is needed.

On behalf of MS Plus again, thank you so much for your generosity.

♥ Gathered Here

Everything End-of-Life

[Write a Will for Free](#) | [Compare Funerals](#) | [Apply for Probate](#)



Gathered Here, Suites 1-8 Kelliecar Lane, Macarthur Square, Gilchrist Drive, Campbelltown NSW 2560, Australia

[Unsubscribe](#) | [View this email in your browser](#)



12 December 2023

Dear Gathered Here Friend,

I am writing to thank you for your incredible support throughout the past year. It's generous people like you who make the lifechanging work of MS Plus possible – and I am so grateful.

**To keep you connected with the transformative impact of your generosity, I have enclosed a copy of the MS Plus Annual Report.**

Inside, you'll find inspiring stories about the wonderful progress made possible by people like you, who play a pivotal role in improving services and fuelling MS research.

Significant capital works have been started over the last few years. These include the redevelopment of the Lidcombe Wellbeing Centre and Specialist Disability Accommodation, as well as the opening of two new Wellbeing Centres in Footscray and Hobart.

**Gifts in Wills from kind supporters like you have enabled the building and expansion of our Wellbeing Centres, which are crucial to our vision of safe and supportive environments for people who have MS.**

Alison is one of many visitors to the Centres who have benefited from state-of-the-art equipment and support to achieve her goals. She told us:

*"Before I started my rehabilitation, I had lost use of my left arm and hand, and it was nearly impossible to lift my left leg. This all made my balance terrible. I had to use a walker to get around and I still fell with that, too."*

Regards,

John Blewonski  
Chief Executive Officer

**P.S. Our Gift in Wills team are here to help you:**

*If you would like to learn how you can make an impact that doesn't cost anything today, please call:*

Rebecca Stalenberg,  
**Gift in Wills Manager**  
on 02 9646 0631

Laura Henschke,  
**Strategic Future Planning Manager**  
on 02 8484 1333



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New South Wales  
Australian Capital Territory  
Tasmania  
Victoria

2 pages

MS PLUS  
Neuro Wellbeing  
**Empowering lives**  
2023 ANNUAL REPORT





# Donor calls often go unanswered

## Tips to get “into the Online” donor:

- Offer donors the option when to receive a call (Online booking)
- Using integrated Survey and Journey tools (eg inbuilt into CRM/ Email client)
- Instead of a pure “GIW ask”, use a “how can you help” and plant the seed for other ways of helping and making an impact on your cause.

Empowering neuro wellbeing and connection

No images? [Click here](#)



Let us get to know you!

Thank you for your kindness and your recent support.

In this survey, we are seeking your feedback to better understand why you have chosen to support MS Mega Challenge Events. We would like to understand your connection to MS and what areas of our work matter most to you.

Your survey shouldn't take longer than two minutes and your responses will remain confidential. We will use the information you provide to help us improve the ways in which we communicate with you.

Let's get started

Thank you



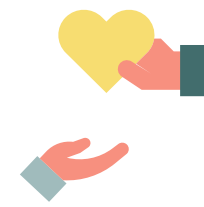
# Key learnings



Information sharing is on the rise within online wills



Online wills allow for more stewardship opportunities



Technology is driving positive changes in giving behaviour



Reaching new audiences is the most effective way to generate gifts



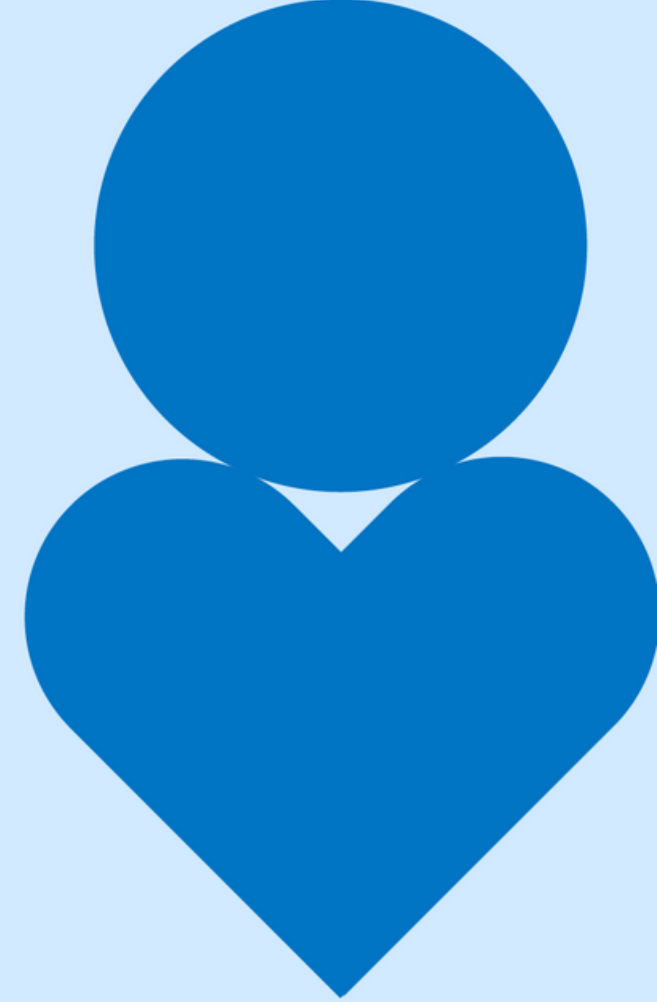
Organisations of every size and budget can benefit

**Get the 2024  
Gifts in Wills  
Report**



**SCAN ME**

**FIA**  
**Conference**  
2024



# Thank you



Gifts in Wills Track Sponsored By:

