

**Bequest Giving Fact Sheet:
7 Fast Facts to Help Fundraisers Make the Case for Drip-Feed Legacy Marketing
(aka Promoting Gifts in Wills)**

1. The opportunity for your organization is massive. [43.9% of nonprofits](#) still don't focus any fundraising/gift nurturing on gifts in wills or estate gifts. And yet... [more than 85% of all planned gifts are made via a will or a trust](#), meaning charitable bequests.

2. Depending on your source, the **average size of a charitable bequest is between \$37,000** (*How to Love Your Donors to Death*, Stephen Pidgeon, 2015) **and \$78,360 (2020)**. That is as much as [1,000X what a donor might give while living](#). And nearly [two out of every 10 wills](#) include more than one bequest.

3. If you think a charitable bequest will decrease annual gifts, think again. After making an estate gift, a donor's [annual gifts increase by more than 75%](#), on average, in following years.

4. Don't stop for coronavirus. In August 2020, will-making website FreeWill saw a [295.21% increase in charitable bequests](#) made over the same month in 2019.

5. As of 2017, **giving by bequest accounted for 9% of all charitable donations**, or \$35.7 billion, an increase of \$12.3 [billion](#) over 2012.

6. Get busy now. Russell James, professor at Texas Tech University, estimates that without nonprofits working to encourage planned gifts, **as much as 90% of donor mortality** (the big generational wealth transfer everyone's waiting for) will "simply result in lost current giving."

7. Don't stop. A 20-year study shows that donor life events dictate when a bequest will be added, and you need to be top of mind. For **nearly seven out of 10 donors in the study, adding a charitable bequest happened within the final five years before passing.**

Compiled by [Lisa Sargent](#), president of fundraising consultancy Lisa Sargent Communications, for the *Chronicle of Philanthropy* webinar, "How to Boost Your Planned Giving Program," on October 22, 2020