

What's in the pipeline?

Over the past few years the outlook for the legacy market has changed significantly. During the recession, a combination of falling house prices and a jittery stock market took their toll on legacy values. Sadly, you cannot affect the economic cycle - but you can adapt your plans and budgets to reflect the changes taking place.

In uncertain times like these, projecting forward your legacy income on the basis of past performance is not particularly helpful. Our clients have seen payout times lengthen and residual values fall. And, while the economic environment affects all charities, its impact is not felt equally. Our research shows that a given charity's performance depends on its notifications history, legator profile and cause area.

“Legacy Foresight's analysis of the external factors affecting the legacy 'market' has proved invaluable in assisting in Cancer UK's budgeting and forecasting of future legacy income.”

Robert Donaldson
Business Analyst, Cancer Research UK

Legacy Foresight has been producing legacy income forecasts for over ten years. We have built up a reputation for accurate, timely medium-term forecasts. These are backed up by clear commentaries, aimed at busy managers and trustees.

How we work

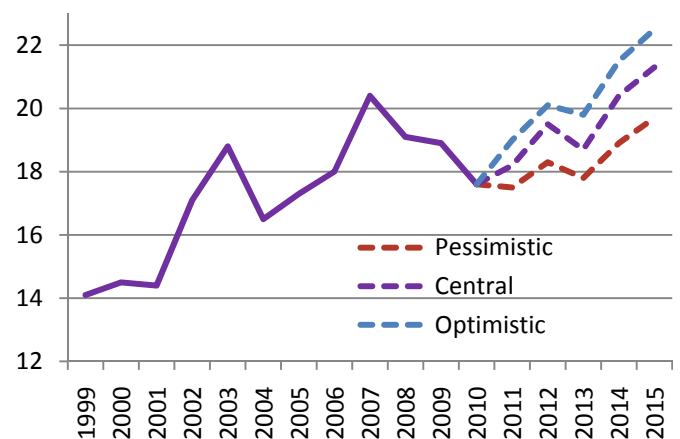
We can forecast your legacy income and notifications over the next 3-5 years (or longer if required), broken down by bequest type. Along with our central forecast, we also provide optimistic and pessimistic scenarios, to help with financial planning and risk management. All we need from you is a small amount of historical income and notifications data – going back over as long a period as you can muster.

What you get

Our standard package is for two sets of forecasts a year, scheduled to suit your planning cycles.

We generally provide one presentation (great for planning sessions or team brainstorms) and one written report a year, backed up by telephone support as necessary. The cost of this full package is £4,750 +VAT; or alternatively you can opt for a single annual presentation at a cost of £3,250 +VAT.

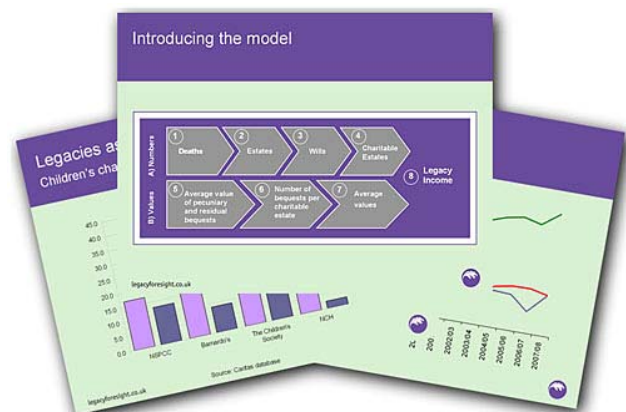
Sample Income Forecasts 2010 – 2015



A range of future scenarios, helping you to manage risk

“The economic analysis is highly worthwhile as it includes a breadth of sources and level of analysis which would not be available in house.”

Stephen Morgan
Head of Legacies, British Heart Foundation



Tailored presentation addressing your performance

What we offer:

- 3-5 year income forecasts:
- Both income and notifications
- Split residual and pecuniary
- Annual presentation; 6-monthly reports; and telephone support as needed
- The latest economic forecasts

Prices start at £3,250 + VAT

About Legacy Foresight

Legacy Foresight works with not for profit organisations to map, model and predict the charitable legacy market. We analyse the state of the legacies sector, produce income forecasts and research into legator motivations.

Since our first legacy project in 1994, we have worked with over fifty clients, including twenty-five of the top thirty British legacy charities.

We work closely with colleagues at Remember A Charity, the Institute of Legacy Management, Legacy Link and Clear software developers to promote the idea of legacy giving, and the principles of effective legacy administration.

Our forecasting clients include:

- Action for Children
- Alzheimer's Society
- Barnardo's
- IFAW
- Macmillan Cancer Support
- National Trust
- Oxfam
- RSPB
- Save the Children
- St Dunstan's
- World Vision
- WWF

In these uncertain times, the need for objective, informed insight is greater than ever. So if you would like to know more about our forecasting services, contact:

Chris Farmelo

Email: c.farmelo@legacyforesight.co.uk

Phone: 020 3286 5275.

Also available from Legacy Foresight:

Legacy Monitor – Analyses and predicts the legacy market, and benchmarks your performance against your peers, by cause, age and size.

Legacy Research – Ad hoc projects to understand changing motivations and attitudes. Recent topics include baby boomer legators, the donor diaspora and the Scottish legacy market.

Legacy Scenarios – Provide a long-range perspective on your legacy potential, by appraising your strategy, performance and positioning.

In Mem Insight – a pilot programme to research and benchmark the fast-growing in memoriam sector.

Legacy Foresight Ltd

Forge House, Main Street
Sinnington, YO62 6SH
www.legacyforesight.co.uk