

include a charity

Help the work live on.

Include a Charity

FIA is pleased to offer organisational members the opportunity to participate in the Include a Charity campaign, which is a collaboration of many of Australia's most progressive charities that have joined forces to promote the concept of bequest giving to dramatically increase revenues for the charitable sector.

By working together, we can change charity giving forever so that over time, gifts in wills become the norm for many, rather than just a few.

Vision

To double the proportion of Australians aged over 60 who have included a gift in their will to a charity, from 7.5% to 15% by 2020.

Benefits of Being Involved

- The Include a Charity website contains practical information about wills and bequests and, most importantly, contains general information and contact details for each participating member charity. All aspects of the Include a Charity campaign direct people to the website for more information – please see www.includeacharity.com.au.
- National media and PR campaigns raise awareness of the Include a Charity campaign and give exposure to Include a Charity's participating charities.
- Training sessions to assist charities to develop successful bequest marketing strategies and best practice bequest administration.
- Networking and knowledge-sharing opportunities with other bequest professionals in the sector.
- Include a Charity undertakes and commissions targeted, practical bequest research to provide participating charities with more accurate and up-to-date information about Australian gifts in wills. This data can help charities better shape their bequest programs and can also be used to help raise greater public awareness.
- Sharing of relevant research data from the successful 'Remember a Charity' campaign in the UK, amongst Include a Charity charities.
- A targeted campaign to solicitors and other legal advisors in order to raise awareness of the importance and simplicity of leaving a charitable bequest amongst their clients. A further campaign is planned for personal financial advisers who focus on wealth management and retirement planning for their clients.
- The Include a Charity campaign gives bequest giving 'talkability', making it easier for charities to discuss the concept and their charity as a beneficiary.
- Substantially increase revenues to participating charities in the longer term.

Achievements

Our goals moving forward are within our reach and will add an additional \$250m per annum to charities by 2020.

Here is what Include a Charity has achieved with your investment to date:

- In five years (2011-15), a combined investment of \$1.34m has delivered \$6.24m media value across Australia*.
- Include a Charity's national advertising campaign dramatically increased public awareness around gifts in wills:
 - In 2013, 12% of all Australians said they would leave a charitable bequest (up from 7.5% in 2005), potentially resulting in an additional \$440m added to charity income each year.
 - 44,025 unique members of the public have visited the Include a Charity website.
- 27% of solicitors are asking the question and over 3,000 are stocking our brochures in their reception areas.
- We have provided free training for more than 550 individuals within the Include a Charity network.
- We have conducted valuable research and benchmarking to equip our charities.

**Mainly national advertising via TV and radio channels and occasionally print media.*

It is clear that we can achieve so much more by working together.

Organisation and Primary Contact Details

Organisation Name: _____

Australian Business Number: _____

Primary Contact Name: _____

Job Title: _____

Postal Address: _____

Direct Phone: _____

Work Email: _____

Website Address: _____

Is the organisation endorsed by the Australian Taxation Office as a charity? Yes No

Campaign fee is based on your individual annual fundraising revenue (excluding any government grants):

Band	Fundraising Turnover	Subscription Fee	Tick Relevant
Band A	\$50,000,000 and above	\$12,100 inc GST	<input type="checkbox"/>
Band B	\$20,000,000 to \$49,999,999	\$9,075 inc GST	<input type="checkbox"/>
Band C	\$10,000,000 to \$19,999,999	\$7,700 inc GST	<input type="checkbox"/>
Band D	\$4,000,000 to \$9,999,999	\$6,380 inc GST	<input type="checkbox"/>
Band E	\$3,999,999 and below	\$2,750 inc GST	<input type="checkbox"/>

All campaign fees will be used exclusively for the Include a Charity campaign and activities.

The organisation confirms that it has agreed to support Include a Charity by paying the Annual Subscription fee for a period of three years with effect from the date of signing this form. Annual invoicing will occur in June for each financial year.

In the event that the organisation's annual fundraising revenue increases or decreases to the extent that the organisation no longer satisfies the eligibility criteria for the current Band, the organisation undertakes to notify Include a Charity of its revised annual fundraising revenue within 1 month of publishing its annual report.

Payment Details This form will become a Tax Invoice when payment has been made ABN 51 943 541 450

Direct Debit

Fundraising Institute Australia **BSB: 082 201 Account No: 65308 4424**

(Please send remittance advice to includeacharity@fia.org.au)

Credit Card

Please email, post or fax the completed form with credit card details.

Email: includeacharity@fia.org.au Post: **PO Box 642, Chatswood NSW 2057** Fax: **(02) 9411 6655**

Card Type: MasterCard Visa Amex

Card No. Expiry date /

Amount \$ Cardholder's Name _____

Signature _____