

Bequests: Equal Opportunity Giving

A new study contradicts widely held assumptions about bequest donors.

by **Melissa Brown**
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WHEN FUNDRAISERS HEAR THE TERM “charitable bequest,” they may most often think of an unmarried woman who leaves a portion of her estate to her favorite charity. But according to a new study, an unmarried man is just as likely to provide for a charitable bequest—and at higher incomes, married people are as likely as singles to do so.

The study, *Gender Differences in Giving Motivations for Bequest Donors and Non-Donors*, found that, after controlling for factors such as income, age, and educational level, single men and single women are equally likely to leave charitable bequests in their Wills.

Moreover, although male and female donors who have never married are more likely than married or widowed donors to leave bequests, single and married donors in households earning more than \$100,000 per year are equally likely to designate bequests.

These findings have important implications as fundraisers encourage donors to consider what Ken Ramsay, founder of the consulting firm Legacy Leaders, calls “the last significant growth area of fundraising.” About 16 percent of the donors surveyed in the study had a charitable bequest in their Will.

“Bequest giving is only going to grow in importance, especially as the Baby Boomers grow older and the inter-generational transfer of wealth begins to oc-

cur in full swing,” says Paulette Maehara, president of the Association of Fundraising Professionals (AFP). “Once individuals are certain their families will be taken care of, many will consider how they can use other funds to make a difference in the world. Charities need to be ready to address these concerns and discuss how a bequest can have a huge impact.”

The *Gender Differences* study, says Patrick M. Rooney, executive director of the Center on Philanthropy at Indiana University, helps nonprofit organizations understand the reasons for charitable giving among donors who already support the cause but who have not yet made a charitable bequest. “Work in this area augments ongoing research undertaken by Center staff and faculty to understand donor motivations,” Rooney says.

When asked why they give to charity, all three types of donors surveyed—donors with charitable bequests in their Wills, those with Wills but no bequests, and those without Wills—cited “helping those with less” most frequently, with women citing it more frequently than men. Religious beliefs were the second-most common motivation for all three groups.

Compared with people with a charitable bequest, not having a bequest was associated with lower income, less education, and lower frequency of attendance at religious services. Donors without a

Will were likely to be younger, to be unmarried, to have lower incomes, to be African American or Latino/Hispanic, or to be infrequent participants in worship services than donors with a Will.

“If I were a fundraiser, I would talk about how a bequest would help somebody realize their ambitions long-term,” says Melissa S. Brown, associate director of research at the Center on Philanthropy and co-author of the study, which was conducted by the Center with a grant awarded by AFP and funded by Legacy Leaders.

Brown recommends that fundraisers focus their bequest efforts on highly engaged donors in their late 40s or early 50s, when most people begin considering their legacies and make their first Wills. “If somebody has shown their loyalty to your organization, you should make sure to ask them how they would like to continue to make an impact beyond their lifetime,” she says.

Donors who have bequests rarely tell the benefiting nonprofits about the gifts, and even if a nonprofit does know, donors can always change their Wills. “Nonprofits have to continue to keep those donors engaged,” Brown says. “People who make a bequest are not necessarily going to remain loyal to the same charity for the next 20 or 30 years unless that charity makes some effort.”

Download the report at www.philanthropy.iupui.edu/Research/docs/2009_AFP_CharitableBequestsGenderDifferencesGivingMotivations.pdf.

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