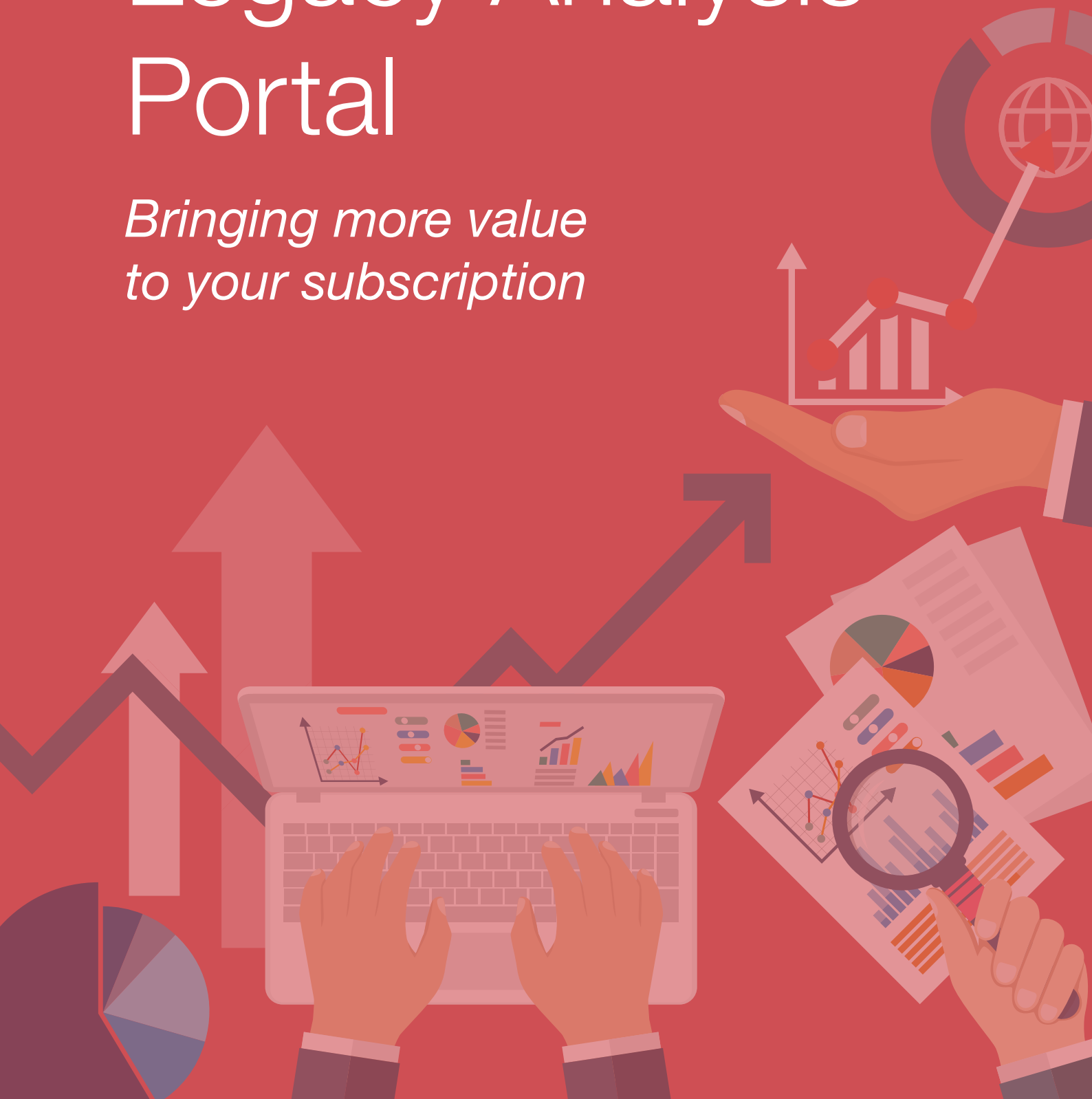


Smee&Ford

Legacy Analysis Portal

*Bringing more value
to your subscription*



Introduction

Smee & Ford have been working with charities to help them understand their legacy income for over 125 years. Our experienced team read over 5,000 Wills per week in order to identify and report charitable bequests and ultimately notify organisations of these gifts.

Smee & Ford collect data on ALL charitable bequests and have built an exclusive and comprehensive bank of information on gifts in Wills dating back to 2012. By accessing this data charities can easily identify the profile and behaviours of their past legators, define growth opportunities, analyse trends and comparators and use this insight to inform their future legacy campaign strategies.

We are very pleased to be in a position to now share views of this data through a new portal we have developed which will give all Smee & Ford customers free access to their own legacy data and the opportunity to delve deeper through our enhanced and bespoke data services.

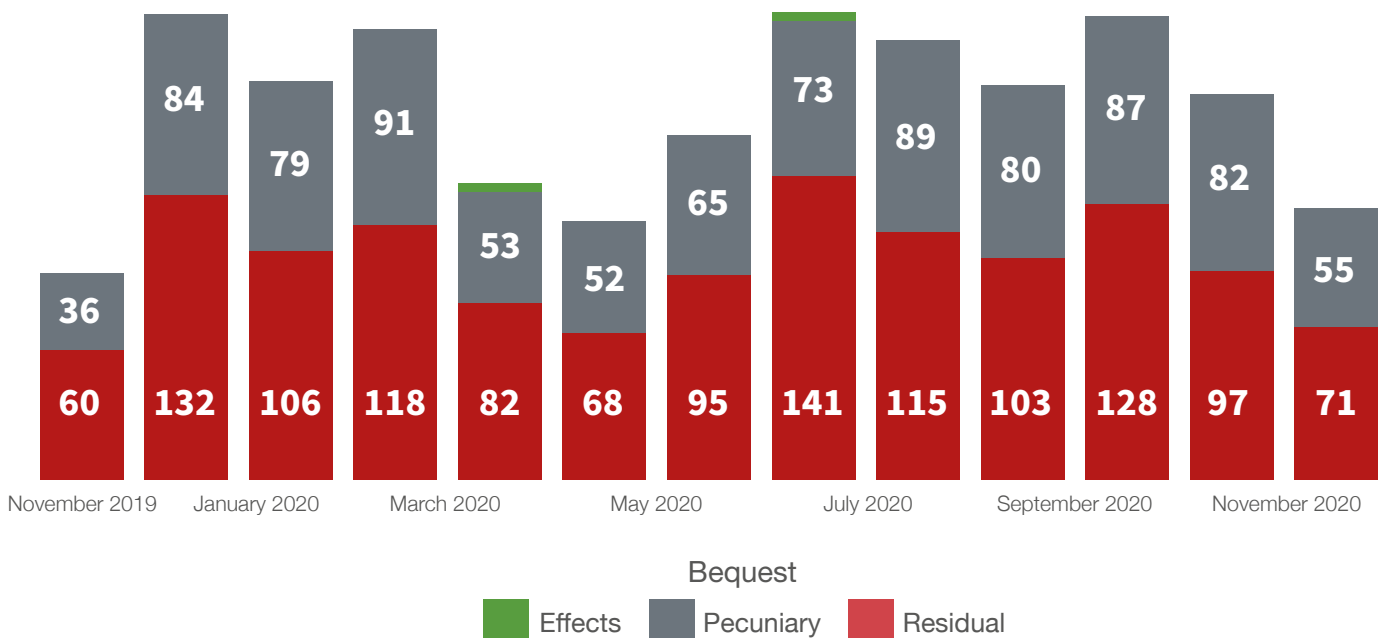


Legacy Analysis Portal

All Smee & Ford customers will now get access to the Legacy Analysis Portal as part of their ongoing notifications service subscription at no additional charge. Here they will be able to view their own charity's data in comparison to the whole sector; with the data refreshed daily, charities will have a clear view of legacy trends as they happen through the following three interactive dashboards:

1. Bequest volume
2. Bequest value
3. Overview of the number of charities mentioned in wills

Monthly bequests in the last year

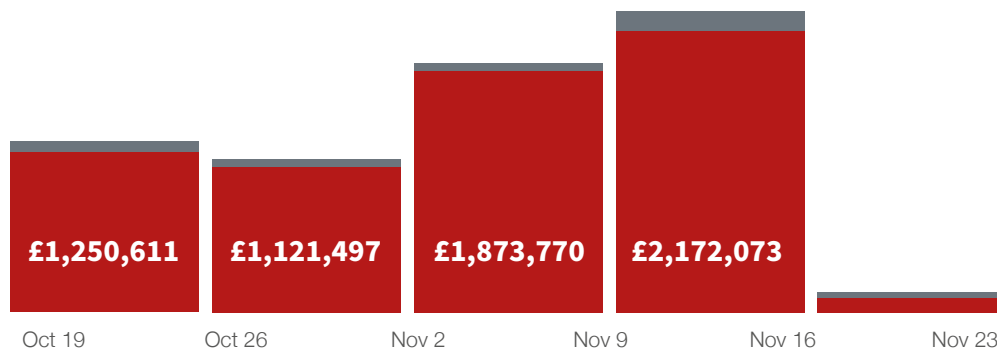


Bequest Volume: allows you to view bequests left to your organisation over the last five years. Filter by bequest type, gender and value to identify trends amongst your legators compared to the sector.

For more information on the Legacy Analysis Portal, please get in touch today:

Visit Smeeandford.co.uk Email: portal@smeeandford.co.uk

Bequest values in the last month

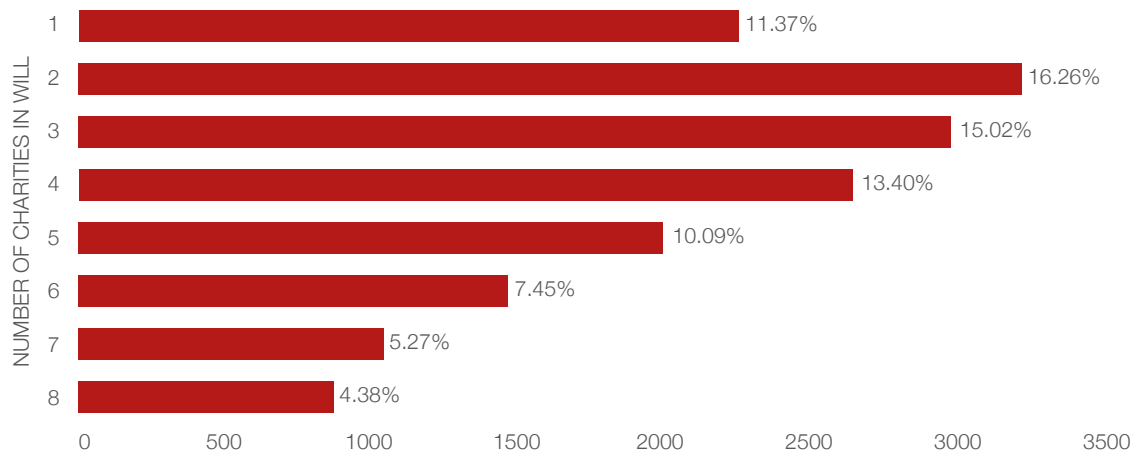


Value % annual change

POPULATION	2013	2014	2015	2016	2017	2018	2019	2020
Other Charities		15.2%	20.8%	3.9%	2.4%	5.1%	-5.5%	-25.5%
Charity 1		26.0%	5.4%	-11.9%	4.8%	6.9%	6.4%	-30.8%

Bequest value: allows you to understand legacy giving based on the value of the gifts from your legators. Compare your average gift value across different types of bequest compared to the sector.

Number of bequests in your wills



Number of charities contained in Will: provides you an overview of how often you feature as a co-beneficiary, giving the fundraising team an idea of how you are viewed as a charity.

The Legacy Analysis Portal is easily accessible via web browser and uses powerful data visualisation software. The software allows you to interact with your data and present findings in the way most useful to you. The multi-view dashboards mean you can look at the data from a range of angles and investigate it at a granular level.

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Enhanced Legacy Analysis Portal

The enhanced portal allows you to identify areas of potential growth and provides deeper insight, enabling the ability to benchmark legacy performance by comparing legacy data with up to six peer charities (of your choice), causal areas and the wider sector.

The enhanced portal provides an expanded range of dashboards including:

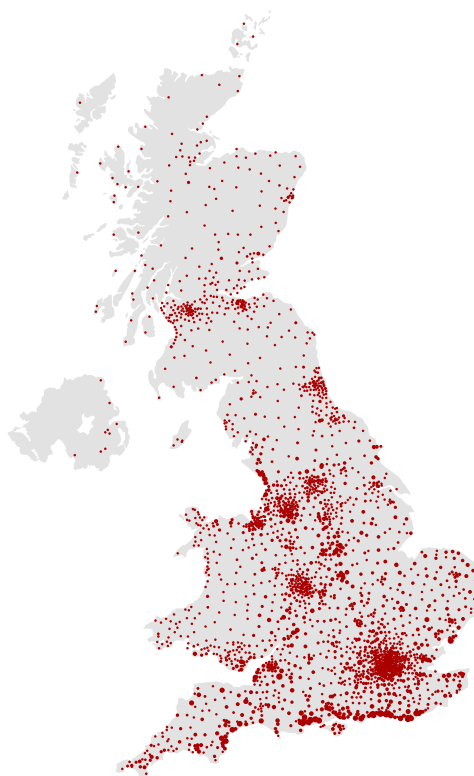
- Charitable estates
- Bequests
- Estate Values
- Lapse Bands
- Gender
- Pecuniary Values
- Estimated Residual Values
- Bequest Detail
- Co-beneficiaries



Detailed regional overviews

All enhanced dashboards allow you to examine the data to a postcode level. Using both the interactive map and regional table, you can understand how giving differs across the country.

Charitable estates



Number of legators by region

Regions	2013	2014	2015	2016	2017	2018	2019	2020
Scotland	322	466	318	775	312	591	391	170
North West	799	890	1,001	798	823	1,007	935	856
North East	495	590	632	543	586	579	543	531
Northern Ireland		1					1	
Wales	358	381	446	352	398	444	375	343
Isle of Man	2		1	2		1	1	1
West Midlands	664	732	636	538	588	740	751	685
East Midlands	556	645	722	695	657	783	650	611
East of England	845	926	1,110	937	976	1,122	1,046	870
South West	1,201	1,320	1,465	1,356	1,405	1,358	1,284	1,127
Greater London	811	926	943	864	914	922	854	728
South East	1,336	1,429	1,663	1,500	1,588	1,588	1,516	1,261
Channel Islands	3	1	1		3	1	1	
Unknown	767	626	1,102	1,087	989	707	364	224
Grand Total	8,159	8,933	10,040	9,447	9,239	9,843	8,712	7,407

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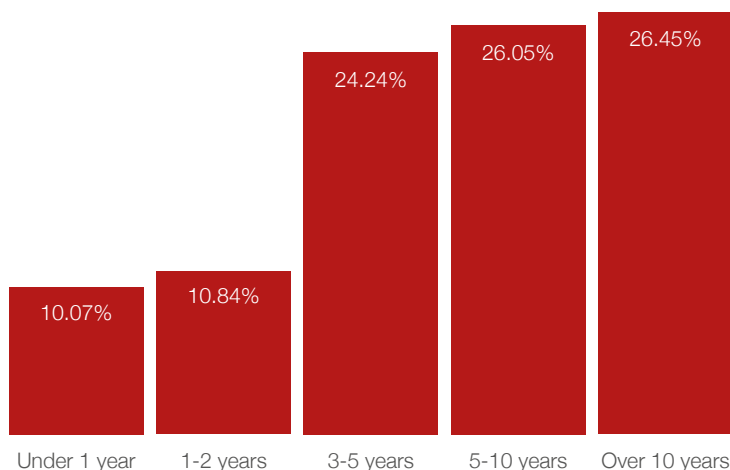
Compare against chosen peer charities

We will help you identify selected charities to benchmark against. The dashboards allow you to compare your performance across various areas against the charities that are of most interest to you when putting together a strategy.

Percentage of estates in lapse bands by charity

POPULATION	Under 1 year	1-2 years	3-5 years	5-10 years	Over 10 years	
Overseas Aid	10.60%	11.90%	26.20%	26.40%	22.70%	2.20%
Other causes	11.50%	11.70%	25.00%	25.10%	24.60%	2.10%
Charity 1	14.50%	14.10%	29.10%	24.20%	15.40%	2.70%
Charity 2	11.80%	12.50%	26.20%	24.30%	22.90%	2.30%
Charity 3	9.20%	10.60%	24.50%	28.10%	25.50%	2.20%
Charity 4	8.60%	9.90%	22.50%	25.80%	31.10%	2.20%
Charity 5	11.10%	11.60%	25.50%	25.70%	23.80%	2.30%
Charity 6	10.20%	10.90%	24.20%	26.30%	26.10%	2.30%
Grand Total	10.20%	10.90%	24.20%	26.30%	26.20%	2.30%

Number of estates in lapse bands



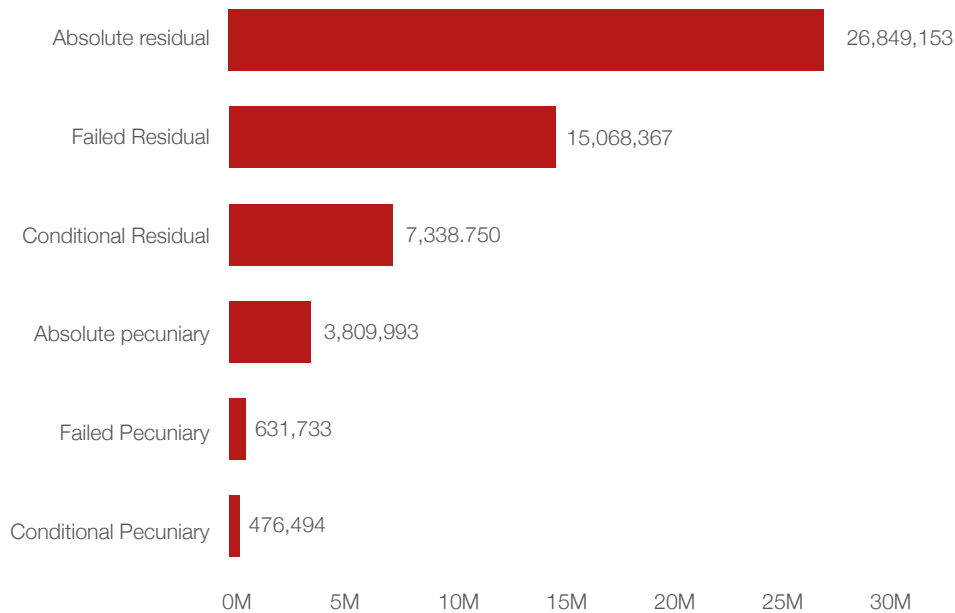
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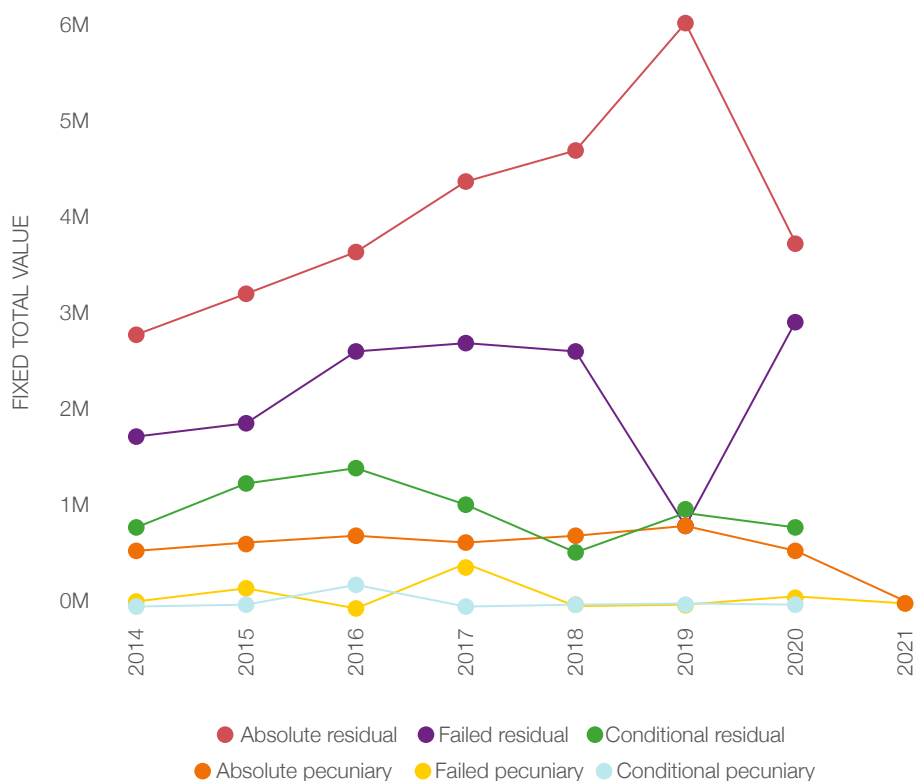
Understanding types of legacy giving

In-depth graphs allow you to understand how your legacy giving breaks down and how it compares to others across the sector. Examine potential areas of growth at a granular level.

Type of bequests – values



Values by type of bequest



Subscription Summary

We have tailored this service to suit the varying needs of different organisations and have split our subscription into two options. As a standard, both give access to a charity's own data.

	Standard	Enhanced
Examine your own data	✓	✓
Compare with national trends	✓	✓
Identify growth opportunities	×	✓
Compare against 6 selected charities	×	✓
Benchmark against your cause	×	✓
User licenses	2	4
Number of dashboards	3	9

Bespoke options will also be available, where charities can work with our team to come up with a solution tailored towards their individual questions and goals.

Pricing

We have worked on an affordable annual pricing model for charities of all sizes, ensuring you get the most from your budget. We have created rates for charities depending on your legacy income band and are currently offering a **33% discount** off the first year.

Annual legacy income >	Standard	Enhanced Introductory offer	Enhanced After first year
£10m+	Free*	£3,000 per year	£4,500 per year
Between £5m - £10m	Free*	£2,000 per year	£3,000 per year
Between £1m - £5m	Free*	£1,000 per year	£1,500 per year
Under £1m	Free*	£500 per year	£750 per year

*Free to Smee & Ford legacy notification service customers

For more information and to book a free demonstration of the enhanced features of the portal, please get in touch today
Visit Smeeandford.co.uk Email: portal@smeeandford.co.uk

Smee&Ford

Smee & Ford, the UK's leading provider of trusted legacy information, is a branch of MiExact. MiExact provides mortality and wills intelligence, analysis and information for the UK charity and commercial sectors. Our purpose is to provide our clients with timely, accurate and reliable data, intelligence and marketing solutions that strengthen their operations and allow them to succeed.

