

2025

octopuslegacy

Innovating

Legacy Acquisition

HELLO

Speakers



Katie Wimpenny

Senior Partnerships
Manager



Harriet King

Junior Brand
Manager



Dani Hernandez

Performance Marketing
Manager

Agenda

- About Octopus Legacy
- Affiliate Marketing
- Reddit
- Optimising Digital Ads: free will vs paid for





ABOUT OCTOPUS LEGACY

**We know.
Because we've been there.**

It is for the people you leave behind. We know the difference a good plan makes and what it's like when there isn't one.

In 2016 our founder Sam's Mum died suddenly. It was tough enough, but the frustration of legal fees and mess that came with it was overwhelming.

That's why we started Octopus Legacy, so no one else has to go through the same thing.

ABOUT OCTOPUS LEGACY

Our Services

Although we began as a 100% online will service, we know from experience that one size doesn't always fit all. Now we cover all bases.



Phone / video

- UK wide
- Completed by a regulated will writer
- Update and storage option



Online

- Covering England and Wales only
- Can be done from the comfort of your own home, in as little as 15 minutes
- Our online will was drafted by a solicitor
- Every will is checked by our legal team - under the supervision of our Head of Legal, a solicitor and STEP certified lawyer
- Unlimited updates for £10 / year



Face to Face

- UK wide
- Completed by a regulated will writer
- At home visit, neutral venue or office based
- Update and storage option



Urgent

- UK wide
- At home, or hospital / hospice / care home visit
- Completed within 72 hours
- Free for supporters due to medical reasons



Legacy
Giving
Awards 2025

Winner of Best Strategic Will Provider 2025,
Legacy Giving Awards 2025, Smee and Ford



ABOUT OCTOPUS LEGACY

Our Partners



Affiliate Marketing

FIRST THING'S
FIRST

What *actually* is an affiliate?

DEFINITION

An affiliate is a partner who promotes your service to their audience, and earns commission for each action taken.

THE PROCESS

Charity ↔ Affiliate ↔ Audience**Charity → Affiliate**

Defines the action they want to be taken, for the affiliate to promote

Provides tools & assets for the affiliate

Pays commission per action

Affiliate → Audience

Promotes the charity's message/service

Leverages trust & credibility for natural, authentic content

Extends reach to new people

Audience → Affiliate → Charity

Engages with affiliate content and takes the intended action

Affiliate earns commission and charity gets intended action completed

New supporter joins funnel for stewardship

Small spend.

20% commission per product sold
via affiliates

Big impact.

£2.7 million estimated future
income for charity partners

14% pledge rate

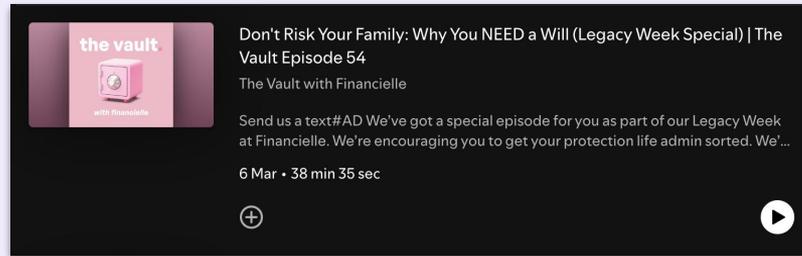
8 in 10 gifts were residuary

2.3 million + reach

YOU GET BACK WHAT YOU PUT IN

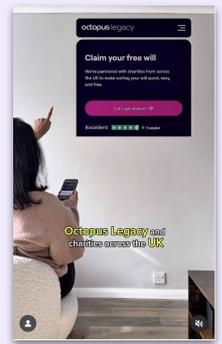
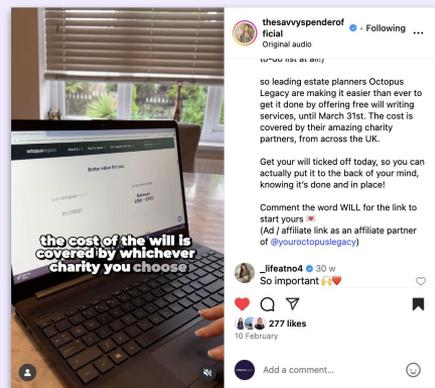
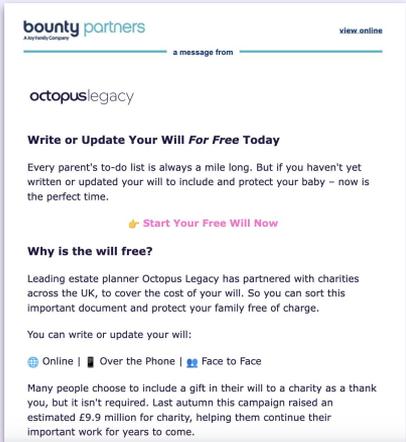
Return on investment = **6,650%**

£1 invested → **£67.50** returned



WHO?

Our Affiliate Partners



HOW TO GET STARTED

Recommendations

- ★ **Start with the right partners:** focus on affiliates whose audience overlaps with your target supporters.
- ★ **Engagement over size:** a smaller, trusted voice can drive better results than a large but disengaged one.
- ★ **Give them autonomy with guidance:** provide a toolkit of messaging and information.
- ★ **Let them stay authentic:** their voice builds trust with their community.
- ★ **Measure and reward fairly:** invest in proper tracking to give affiliates confidence and ensure accurate results.

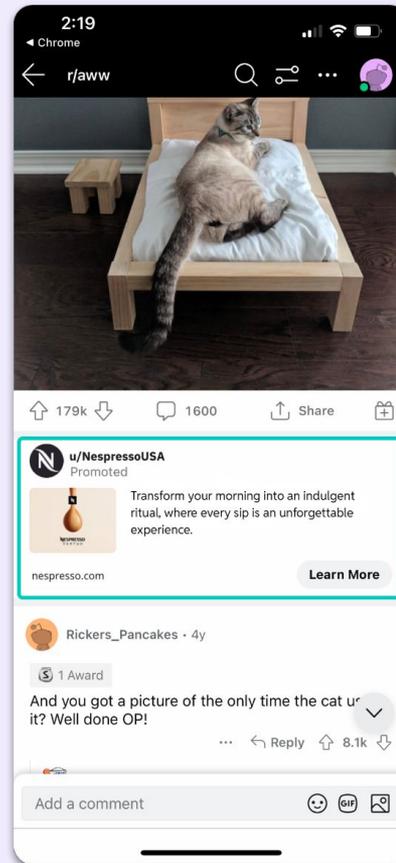
Reddit

MORE ABOUT REDDIT

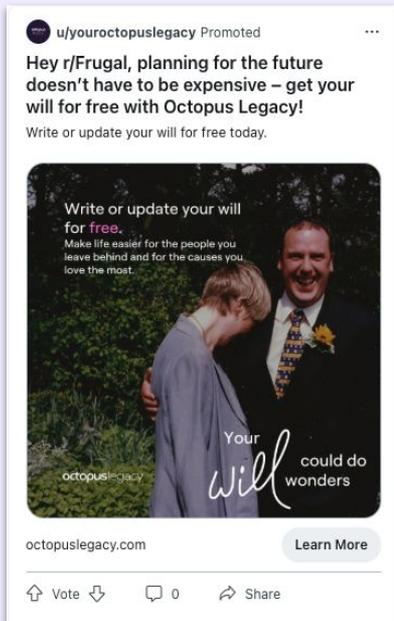
The community-first social platform, and #1 platform people visit to find advice about products and brands.

90%
of users trust Reddit to
learn more about
products/services and
brands

79%
of people would be
interested in seeing
brands share
information about their
products on Reddit.



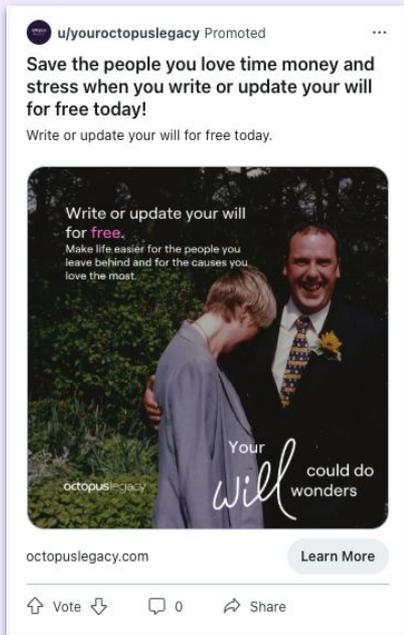
USING REDDIT TO SUPPORT CHARITIES DURING OCTOPUS LEGACY'S FREE WILL CAMPAIGN



Utilising a community-first approach with audience-first messaging for higher impact.

- Campaigns targeting communities interested in charity, personal finance, and life planning
- Messaging focused on calling out targeted communities, then guiding people to legacy will journeys
- Casual tone and upfront transparency about the offer is key for this community

Niche Opportunity.



Big impact.

317K users reached

12% pledge rate

1 out of 3 were residuary gifts

0.30% Ad Click-through-rate

HOW TO GET STARTED

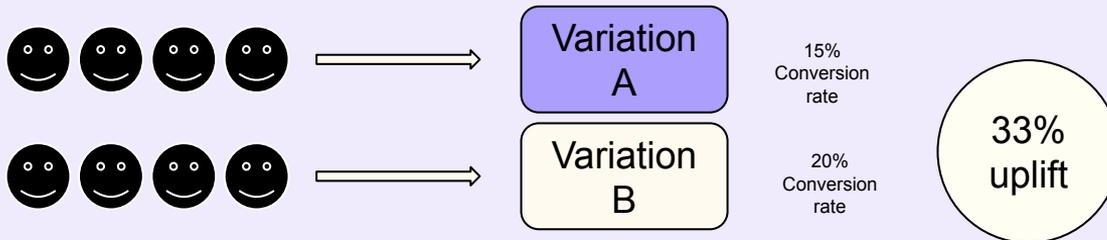
Recommendations

- ★ **Utilise Reddit's Objective-based campaigns:** be clear if you want awareness, leads, or online conversions.
- ★ **Make your ad look like an ad & call out your audience:** authenticity is key - don't disguise your ad.
- ★ **Dig into what the numbers are telling you:** don't just focus on reach and CTR - understand what the user behaviour is telling you.
- ★ **Re-fresh creatives:** keep creatives fresh to avoid ad fatigue - these audiences tire quickly.
- ★ **Dig into the Reddit communities:** find subreddits where legacy conversations are happening and target them.

Testing with Digital Ads: Free will vs Paid for

A/B TESTING TO SUPERPOWER DIGITAL ADS

Methodology behind A/B testing

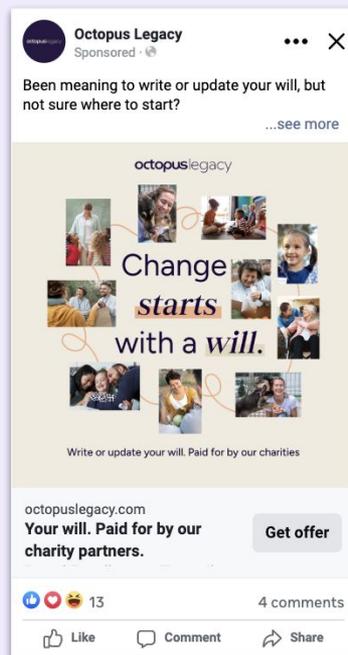
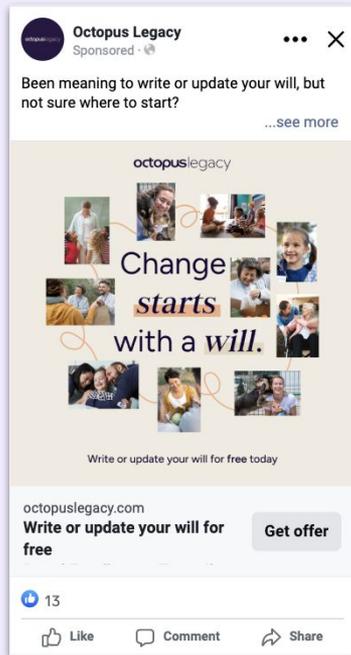


A/B testing can increase conversions by **10-400%**, depending on the element tested

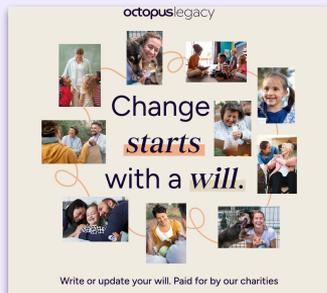
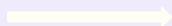
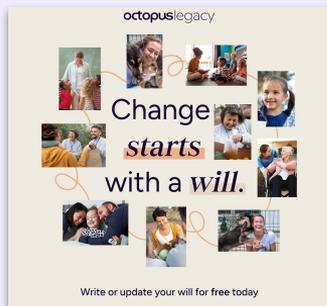
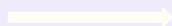
Nonprofit A/B tests on email designed showed **+29%** donations when using authentic/plain text styles vs polished templates

A/B TESTING TO SUPERPOWER DIGITAL ADS

Utilising Facebook's A/B Testing tools to test Free Will Messaging vs Paid for by Charity messaging



Small change.



200% uplift on pledge volume

Big impact.

2x more pledges

267% increase in pledge rate

100% of gifts were residuary

78% uplift in lead volume

HOW TO GET STARTED

Recommendations

- ★ **Start with a hypothesis:** this will dictate your test's requirements, measurement and set up.
- ★ **Use proper A/B Testing tools:** this will ensure good quality results you can rely on!
- ★ **Change only 1 element at a time:** ensuring you can pinpoint the change that is driving the difference.
- ★ **Statistical significance is key:** this will avoid you acting out on results which could be happening only by chance!
- ★ **Data reporting & implementation:** make sure you can track each variant's performance and use the insights generated to inform the next round of your tests.

Thank you!

Contact us:

partnerships@octopuslegacy.com

Join our online community, Leg up for Legacies:

