

How the American Heart Association raises tax-smart gifts today and secures millions for the future with FreeWill



THE OPPORTUNITY

The American Heart Association (AHA), a leading organization in the fight against heart disease and stroke, sought to grow their planned giving program and streamline their non-cash giving processes.

The AHA faced challenges in making non-cash giving more accessible and engaging, particularly in facilitating various types of gifts such as bequests and tax-smart gifts like Qualified Charitable Distributions (QCDs) and stock donations. With a high volume of donors, their team also struggled with sharing tax acknowledgments in a timely manner.



Before FreeWill, we were talking to donors about non-cash gifts, but our partnership let us move from education to action.

Pamela Leonard
National Executive Lead,
Charitable Estate Planning
Program Advancement

THE OPPORTUNITY (continued)

“We didn't have an interactive way to take QCD requests from donors. The process was to have them do it themselves and tell us when they're done, and that's not very donor-centered,” says Pamela Leonard, National Executive Lead of Charitable Estate Planning Program Advancement.

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THE SOLUTION

In their efforts to grow planned giving, the AHA invested in a National Featureship, which showcases their name, logo, and mission to thousands of will-makers using the FreeWill site every day and continues to introduce new donors into their pipeline.

“The leads and gifts we receive through the National Featureship from donors who saw us on your site, and whom we may never have reached otherwise, are truly invaluable,” shares Kelley Riedy, National Executive Lead of Marketing Communications.

Their team is also actively promoting legacy giving to existing supporters by implementing the Planned Giving Suite, allowing the AHA to offer its audience the opportunity to create a legally valid will or trust.

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The Smart Giving Suite allows us a kind of ease in marketing. You lead donors to one URL, one QR code, one call-to-action, and let them organically discover other ways to give when they're there on our page.

Kelley Riedy
National Executive Lead,
Marketing Communications,
Donor Engagement

THE SOLUTION (continued)

Through targeted outreach and planned giving appeals, the AHA provides a free resource to their audience that ensures donors' intentions are properly documented and gives the team greater visibility into planned gifts committed to the organization.

After raising millions of dollars in bequest commitments with both tools, the AHA brought on the Smart Giving Suite to streamline the process of accepting non-cash gifts like QCDs, stocks, and Donor-Advised Funds.

FreeWill's Smart Giving Suite provides a user-friendly way for their donors to take action, enhancing the donor experience and the AHA team's efficiency. It also improved their ability to match donor information with received funds, addressing a significant challenge and allowing the AHA's development team to effectively steward donors using FreeWill's platform.

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FreeWill has also empowered the AHA's frontline fundraisers to more actively promote non-cash gifts by allowing them to drive donors to a centralized location to learn about non-cash giving vehicles and start the giftmaking process.

In 2023, their 5th year of partnership, the AHA raised \$6.6 million in primary bequest commitments and \$1.9 million in real-time gifts through FreeWill.

RESULTS

\$644M+

in total legacy commitments since 2018

\$1.9M

in real-time gifts since 2023