

Achieving breakthroughs in planned giving:

Cancer Research Institute's success with FreeWill



THE OPPORTUNITY

The Cancer Research Institute is a 70-year-old organization dedicated to studying immunotherapy for cancer treatment and prevention. CRI spent over two decades as the first and only organization focused on the potential of the immune system to fight cancer.

Historically, the Institute relied heavily on revenue from ads in national white and yellow page directories. For years, CRI struggled to determine how to drive the same or better results in the era of digital marketing. The CRI development team was introduced to FreeWill through a board member and saw the potential to reach a national audience in a new, digitally-oriented age.



FreeWill has moved us beyond the white pages. It's helped us replicate the national exposure that the white and yellow pages gave us, and brought us into the digital age.

Rupinder Kaur
Chief Information Officer

THE SOLUTION

The CRI team launched their FreeWill partnership in 2021 with the Planned Giving Suite and a National Featureship on FreeWill.com. A FreeWill Featureship displays CRI's cause to will-makers creating their estate plans on the FreeWill site. The Featureship created a unified marketing presence to reach new donors and gain insights for continued stewardship. With CRI's logo on display to hundreds of thousands of will-makers using FreeWill.com nationwide, the organization has a clear voice and strong visibility across all 50 states and D.C.

Before FreeWill, the Institute received almost all of their bequest commitments from yellow and white pages. The FreeWill National Featureship has replaced various regional advertisers with a consistent message, helping the organization replace and build upon the pipeline that print marketing brought in for years prior. They've also unlocked a new donor engagement strategy to cultivate using data provided by FreeWill.

With access to insights on their growing list of new donors from FreeWill.com in their Partner Portal, CRI's team is able to leverage FreeWill data to further engage with legacy donors. The team incorporates these new donors into their fundraising plan, converting many into monthly donors. The CRI team keeps legacy donors engaged by adding them to outreach lists for recurring updates about the organization's initiatives.

They also follow best practices for donor recognition and gratitude by sending hand-written thank-you notes to legacy donors, and ask them if they'd like to be recognized in CRI's Annual Report.

Since their investment in FreeWill, CRI's planned giving successes have resulted in the team nearly doubling its planned giving goals of \$2-3M to nearly \$5M per year, empowering the team to significantly increase the budget for planned giving.



Before FreeWill, we had to find another pipeline that could continue to give us dollars for the work that's still not yet done. FreeWill stood out to us for providing a unified voice and offering a service that everyone needs.

Rupinder Kaur
Chief Information Officer

RESULTS

\$40M+

in total legacy gift commitments from 1,850+ legacy gifts

1,500+

primary bequest commitments