

How The City College of New York raised **\$3.1M** in commitments with FreeWill's Planned and Smart Giving Suites



THE OPPORTUNITY

For more than 175 years, The City College of New York (CCNY) has been a driver of social and economic mobility, creating impact, advancing education, and supporting its community. Ranked #1 among all US colleges for return-on-investment, CCNY continues to empower students to thrive, on campus and in their careers.

Despite a longstanding legacy society, CCNY's fundraising team lacked the resources and systems needed to proactively cultivate and manage planned gifts. Being a small team with limited bandwidth also prevented CCNY from efficiently tracking and managing tax-smart gifts, such as gifts of stock and grants from Donor-Advised Funds.

The urgent need for a streamlined, effective solution was clear, especially as the tax-smart gifts coming in often remained anonymous, causing attribution issues and donor relationship challenges.



FreeWill is a win-win. We are able to send educational materials to our audience with clear steps they need to take to make a gift or create a will, and they are able to receive a quick and easy set-up to fulfill their needs.



Sarai Perez
Alumni Relations
Manager

THE OPPORTUNITY (continued)

“The biggest problem is knowing who our gifts are coming from. We occasionally receive gifts without knowing who the donor is, and sometimes, we’re unable to trace them at all,” shares Barbara Evans, Associate Executive Director of the Office of Institutional Advancement.

THE SOLUTION

CCNY partnered with FreeWill to grow their legacy giving program, and launched FreeWill’s Planned Giving Suite during Make-A-Will Month to encourage their supporters to make a will for free and prompt will-makers to consider including CCNY as a beneficiary. Following their planned giving success, they expanded their partnership to include the Smart Giving Suite, streamlining gifts of stock, Donor-Advised Funds, Qualified Charitable Distributions, and cryptocurrency.

With strategic support from their dedicated Partner Success Strategist and Content Writer, CCNY runs multiple targeted campaigns each year to promote planned and tax-smart giving with a customized message fit for their audience.

“FreeWill feels like another staff member keeping us up to date on the latest trends and content best practices,” shares Sarai Perez, Alumni Relations Manager.

The Smart Giving Suite also resolved CCNY’s previous challenges by simplifying and providing full visibility into the gift lifecycle through FreeWill’s Partner Portal, which notifies the team whenever donors initiate or complete a gift.

“Our partnership with FreeWill benefits donors because it provides a simple way for them to give stock or from their Donor-Advised Fund, so we’re doing something that makes donors’ lives easier,” explains Evans.

In fall 2024, CCNY successfully secured a \$1 million stock gift through the Smart Giving Suite. Over three years, the partnership with FreeWill has helped CCNY raise more than \$1.6 million in legacy gift commitments and \$1.5 million in real-time, tax-smart gifts.



If you follow the instructions of your strategist, you are going to bring in revenue. Just send the provided emails, promote the tools on your social media accounts, and include it in your digital and/or print newsletters. Donors will support you in a way that aligns with their personal philanthropy.



Barbara Evans
Associate Executive
Director of Institutional
Advancement,
Communication &
External Relations

RESULTS

\$1.5M

in real-time gifts

\$1.6M+

in legacy gift commitments

16

real-time, tax-smart gifts

39

legacy gift commitments