

How Jax State Leveraged the FreeWill Planned Giving Suite & Microsite to Secure **\$250K** In New Legacy Commitments



THE OPPORTUNITY

Jacksonville State University (Jax State), a public university in rural Alabama with fewer than 10,000 students, sought to strengthen its planned giving program. Known for its community focus, NCAA Division 1 Football program, and accomplished graduates, Jax State saw an opportunity to foster a stronger culture of legacy giving among alumni.

Many alumni and donors wanted to leave a legacy but lacked the knowledge or resources to navigate planned giving. Limited education and visibility made it difficult for Jax State to effectively communicate its importance. Before adopting a Planned Giving Microsite, Jax State relied on in-person conversations and traditional outreach, restricting its ability to scale. By embracing a digital approach, the university aimed to expand its reach, simplify the process for donors, and enhance its planned giving efforts.



Some planned giving website vendors are so complicated. They go way above the normal donor's head. But the FreeWill Microsite is written in a way that is so easy to read and understand.



Kim Dalesandro
Planned Giving Officer

THE SOLUTION

In 2024, Jacksonville State University partnered with FreeWill to modernize its planned giving approach. Central to this initiative was the creation of a contemporary, action-oriented, and donor-focused Microsite. After working with another vendor whose site Jax State felt was outdated and not user-friendly nor donor-centric, Jax State was drawn to the streamlined and intuitive design of a FreeWill Planned Giving Microsite.

These Microsites act as dedicated educational hubs, offering resources tailored to donors while seamlessly integrating with the FreeWill Planned Giving Suite. By adopting this online platform, designed to guide donors through every step of the giving process, Jax State made planned giving more accessible than ever. Featuring a modern, user-friendly design customized to Jax State's brand, the Microsite allowed donors to easily learn about their options and complete their gifts, all in one place.

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Jax State's partnership with FreeWill also includes the Planned Giving Suite, comprehensive planned giving software that provides donors with online tools to create a legally valid estate plan, with built-in nudges for charitable giving; while also providing access to custom content and outreach to solicit legacy gifts. To maximize reach, Jax State implemented a multi-channel outreach strategy. FreeWill provided strategic, customized content and tracking links, enabling targeted email campaigns to be sent to alumni based on age and engagement. Planned giving messaging was also integrated into various



FreeWill has been wonderful for us, because it's easy to understand and makes it easy for us to go into a planned giving conversation with a donor.



Kim Dalesandro
Planned Giving Officer

THE SOLUTION (continued)

communication channels, such as Jax State’s online newsletters, social media platforms (including private alumni groups and university-affiliated groups), and even new employee orientations.

Furthermore, Jax State emphasized the importance of estate planning to alumni, highlighting the simplicity and accessibility of the FreeWill estate planning tools. This involved providing educational resources and encouraging open conversations about legacy giving within the university community. By providing a dedicated and user-friendly Microsite for planned giving information, Jax State has effectively communicated its message to alumni, increased engagement, and ultimately secured a stronger foundation for future legacy support.

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Since January 2024, Jax State has raised over \$255,000 in primary bequests and documented an additional \$7,605,000 in secondary and tertiary bequests.



I'm thrilled with FreeWill. It's been a full year of partnership and I'm very happy with our results.



Kim Dalesandro
Planned Giving Officer

RESULTS

\$255K

in primary bequest commitments in one year

\$8.2M

in total new legacy commitments including secondary and tertiary since adopting FreeWill