

How the Marine Corps Scholarship Foundation generated nearly \$4M in planned gift commitments through FreeWill's National Featureship

The Opportunity/Challenge

The Marine Corps Scholarship Foundation (MCSF) is the nation's oldest and largest needs-based scholarship provider for military children, dedicated to honoring Marines by educating their children.

While the organization had a long-standing legacy giving program, it remained relatively flat for years and largely dependent on passive engagement. Outreach was limited, and growth in new legacy society members was slow and inconsistent.

"We had been stuck at about 120 to 140 legacy society members for a number of years," shared Casey Bingaman, Director of Investor Strategies & Legacy Giving. "There wasn't a lot of activity or momentum."

At the same time, leadership recognized the significant long-term opportunity in planned giving but needed a more scalable, efficient way to grow the program without adding strain to internal teams.

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It's so easy and effortless. Time is money, and this has made me look much better than I probably deserve because it frees me up to actually think strategically.

Casey Bingaman
Director of Investor Strategies &
Legacy Giving

The Solution

To accelerate growth in its legacy giving program, MCSF partnered with FreeWill to support its planned giving efforts and help bring greater visibility and efficiency to its work.

The partnership introduced new tools and touchpoints across MCSF's existing communications. Working with their Partner Success Strategist, MCSF developed planned giving-focused content and messaging that could be layered into campaigns already in motion, from quarterly newsletters to end-of-year appeals and Giving Tuesday solicitations.

A key driver of new member growth was FreeWill's National Featureship, which helped increase visibility for MCSF's planned giving efforts beyond its existing audience. FreeWill's National Featureship proved especially impactful, driving the overwhelming majority of new bequest commitments and helping MCSF unlock nearly \$4 million in future giving from donors who may not have otherwise been reached.

"It's so easy and effortless. It frees you up to actually think strategically instead of just managing tasks," shared Bingaman.

One of the most meaningful shifts was the ability to identify donors who had already expressed interest in legacy giving but were previously unknown to the team. Through FreeWill, MCSF was able to surface and recognize these supporters more clearly.

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Casey Bingaman
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The Solution (CONTINUED)

As a result, the organization gained greater visibility into its planned giving pipeline and improved how it tracked and understood donor activity. “Now we can actually see those donors and steward them better,” Bingaman added.

In the first fiscal year partnering with FreeWill, MCSF welcomed 104 new legacy society members through FreeWill, growing its legacy society from approximately 174 to 278 members. Across all efforts, FreeWill helped the organization transform a stagnant program into a growing and measurable pipeline of future giving without adding significant internal burden.

MCSF has also continued to enhance the donor experience by implementing FreeWill’s Smart Giving Suite widget on its website. The widget integrates directly into MCSF’s online giving pages, enabling donors to complete their gifts within the organization’s branded environment. By making the giving process more seamless and intuitive, MCSF is helping donors take action more easily while strengthening engagement across its fundraising efforts.

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We now have better visibility into who gifts are coming from before they arrive. That alone has been a huge improvement for our internal process.

Casey Bingaman
Director of Investor Strategies & Legacy Giving

Results

86

primary bequests

\$3.9M

in primary bequests