

How Overture Center for the Arts raised \$2.8M in legacy gifts with FreeWill's Planned Giving Suite



THE OPPORTUNITY

Overture Center for the Arts is a nonprofit performing arts center that supports the community with free and low-cost programs, from childhood arts education to adult engagement in the arts. With a dual revenue model, they fund their work through ticketed events and extensive fundraising initiatives.

They established the Anderson Legacy Circle, named after their first planned gift donor, and sometimes hosted estate planning webinars and events. However, they found it challenging to expand their planned giving efforts.

"We had the concept of a legacy society but hadn't really formalized it," explains Judy Ham, Director of Individual Giving.



FreeWill has helped us discover so many people who deeply love Overture but were off our radar. For instance, longtime patrons who've sat in the same seats for 20 years are now within reach as potential legacy donors—connections we might never have made without FreeWill.



Judy Ham, MBA, CFRE
Director of Individual Giving

THE OPPORTUNITY (continued)

After discovering FreeWill webinars, Judy found them valuable for her team. A FreeWill staff member later reached out, providing more details about the Planned Giving Suite and assisting Judy in presenting its value to Overture's development committee.

Overture saw FreeWill as a partner to help build a more comprehensive planned giving program with accessible estate planning tools, consistent marketing materials, and donor education.

THE SOLUTION

Through FreeWill's Planned Giving Suite, Overture brought structure to their planned giving program by helping drive new gift commitments, and identify and steward high affinity donors by offering a free estate planning tool to supporters of Overture.

By participating in quarterly campaigns such as National Make-A-Will Month and National Estate Planning Awareness Week, they utilized FreeWill's effective messaging and a consistent schedule for engaging their audience on estate planning and legacy giving.

Overture follows other FreeWill best practices, like casting a wide net by sending planned giving outreach to all of their network and encouraging supporters to report existing planned gifts through FreeWill's Gift Intent Form.

These strategies have encouraged previously unknown supporters, including younger individuals, to include Overture as a beneficiary in their estate plan. Sharing FreeWill's Gift Intent Form has also uncovered surprise legacy gifts—such as a \$2.5 million bequest from a board member.



Working with FreeWill has shown us the incredible opportunity we have to connect with our network—our volunteers, donors, and everyone we engage with. It feels like we've only just begun to explore the possibilities.



Judy Ham, MBA, CFRE
Director of Individual Giving

THE SOLUTION (continued)

“FreeWill has shown us that there are so many people we don't know about who love Overture, and the different ways we can communicate about planned giving to people who might not be your ‘typical’ planned giving prospect,”

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Overture has also found a thought partner in FreeWill. From attending FreeWill's public webinars and sharing key takeaways with the Overture team to leveraging resources like the marketing library and the AI-powered donor communications tool, William, Overture has maximized FreeWill's support to shape their outreach strategy.

“I feel like FreeWill is another person on our team to help us accomplish what we want to achieve.”

Since August 2023, Overture has raised over \$193,000 in primary bequests with the Planned Giving Suite and documented \$2.8 million in outside bequests through FreeWill's Gift Intent Form.



There's nothing more exciting than receiving a FreeWill notification that someone has chosen to make a gift.



Judy Ham, MBA, CFRE
Director of Individual Giving

RESULTS

\$193K+

in primary bequest commitments

\$2.8M+

in total new legacy gifts raised