

How Rocky Mountain Equality boosts legacy giving and offers security to supporters with FreeWill



THE OPPORTUNITY

Rocky Mountain Equality is a service and advocacy organization serving the LGBTQ+ community in Colorado and beyond. With a profound presence in the community and a passionate donor base, they needed to unlock the potential of planned giving to ensure the future of their advocacy for the LGBTQ+ community.

The complexities of estate planning within the LGBTQ+ community compounded the challenges, as many individuals face unique legal and familial circumstances that could complicate their final wishes.

The Rocky Mountain Equality team knew they had anonymous legacy donors from over the years, but lacked context and data on these unconfirmed gifts.



I am the main person working with our individual donors. Understanding the complexity and nuance of planned giving, I knew I needed help. I was drawn to the idea of not having to learn the language immediately, but getting to learn alongside my community as FreeWill worked on our planned giving communications.



Kyl Caragol
Director of
Development

THE SOLUTION

Rocky Mountain Equality launched FreeWill with their “Queer and Aging” session, an event for LGBTQ+ individuals to learn from queer experts in the field of financial, housing, and estate planning. The event empowered folks to leave the event with valid, updated estate planning documents for free.

This yielded 8 bequest commitments through the tool and encouraged several other people to share their legacy gift intentions with their Director of Development, Kyl Caragol.

Integrating digital and in-person events is an idea Caragol recommends for others considering FreeWill: “Some of our biggest, most successful, campaigns have combined FreeWill communications with events that people can join to be part of something. It’s crucial to think outside the box and to connect with your donors.”

This strategy was developed in collaboration with their assigned Partner Success Strategist, who works closely with Caragol to develop custom messaging that best resonates with LGBTQ+ individuals.

A critical aspect of the partnership is FreeWill's ability to tailor communications to the unique sensitivities of the older LGBTQ+ community, often avoiding certain terminologies that might resonate negatively based on past traumas.

These considerations have proven to be effective based on how many older community members have utilized FreeWill to complete their estate plans and leave a gift to Rocky Mountain Equality in the process.

“There are quite a few folks of means, but there are just as many, if not more, people who leave us five hundred or a thousand dollars. I think that’s a testament to the power and impact of our planned giving work – ‘What I’m going to write into my will is whatever I can do.’”

In just one year of partnership, Rocky Mountain Equality has generated 19 bequest commitments and helped 74 members of their community create an estate plan to ensure their wishes are honored and respected.



FreeWill is a great product. It’s going to help you build up your legacy giving capacity and your base.



Kyl Caragol
Director of
Development

RESULTS

\$49K+

in primary bequest commitments