

Innovating Legacy Planning and Realized Bequests:

# How FreeWill helped Trevecca Nazarene University reach a younger audience



## THE OPPORTUNITY

Trevecca Nazarene University, located in Nashville, Tennessee, is a private, Christian university with the mission to provide education oriented towards leadership and service.

They aimed to increase the number of planned gifts left to the university, starting with recent graduates. The university was struggling to engage and mobilize a younger generation for estate planning and legacy gifts.

Trevecca decided to partner with FreeWill to present estate planning as a resource to their younger audience, including some of their more recent graduates, and those in their 30s and 40s, who have begun their adult lives, started new jobs, and are beginning to have families of their own.



FreeWill provided exactly what I was looking for in reaching the younger generation. It's easy, accessible and has opened up a new arena for our university.

**Don Hastings**  
Engagement Officer  
Legacy Planning and Senior Adult  
Engagement, Office of University  
Engagement

## THE SOLUTION

FreeWill's user-friendly, accessible, and free estate planning platform made it easy for donors of all ages to contribute to the school. For Trevecca, FreeWill serves a dual purpose: to provide a free estate planning resource to the younger audience and to give those younger supporters a way to make impactful gift commitments to the school. Without FreeWill as a resource, these supporters would likely not have been given this opportunity.

Implementing FreeWill was quick and easy for the Trevecca team, with minimal additional work to maintain. This allowed them to continue offering a one-on-one strategy to their older supporters, who may expect a higher-touch approach.

Trevecca Nazarene worked with their FreeWill Strategist and Content team to craft relevant, personalized communications that resonated with a young, Christian audience. Hastings found success with consistent mentions of FreeWill and free estate planning resources in their marketing outreach: "We use it in all of our marketing materials because it's easy and it's reaching a community that we have not been able to reach before."

With FreeWill, the university was able to secure substantial donations, including a \$15K insurance policy, through a realized beneficiary designation made through the FreeWill platform. Trevecca saw legacy gifts being pledged from older donors and younger donors alike. They surpassed their original goal of 12 gift commitments in two years, and ultimately secured 28 gift commitments for the university within their first year of partnership.

In two years, Trevecca Nazarene has generated over 60 primary bequest commitments. Their FreeWill partnership allowed them to effectively and compassionately provide estate planning resources and legacy giving opportunities to all members of their audience.



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## RESULTS

# \$15K

realized beneficiary designation in the first two months

# 62

primary bequest commitments in two years of partnership