



CASE STUDY | PLANNED & SMART GIVING & LOCAL FEATURESHP

\$555K in bequest commitments and counting:

How Habitat Omaha expanded its Legacy Society with FreeWill

The Opportunity

Founded in 1984, Habitat for Humanity of Omaha brings people together to build homes and hope, with a vision that everyone has a quality, safe, healthy place to live. Its work extends beyond homeownership into families' housing, health, safety, education, and financial stability.

As Habitat Omaha helped more families become homeowners, its team began thinking about what came next: how could those families preserve the wealth they had built and pass it on to future generations?

At the same time, the organization's development team was looking for ways to make planned and non-cash giving easier for donors and less dependent on internal staff. Before FreeWill, stock gifts required the CEO to initiate transfers, creating bottlenecks whenever they were unavailable, and planned giving was similarly limited to donors with whom the team already had deep relationships.

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LeAnn Kassube
Development Systems Manager

The Opportunity (CONTINUED)

“Our pool was really limited to the stakeholders that we were already engaged with locally,” shared LeAnn Kassube, Development Systems Manager. “But having a tool that creates a planned giving environment that exists independently in a second space without the need for us to control it, it opened up that pool nationally.”

The Solution

Habitat Omaha began using FreeWill to create a more accessible, self-service experience for planned and non-cash giving, while weaving the tools into its broader communications strategy.

For planned giving, FreeWill expanded the organization’s reach beyond its existing donor relationships. Donors could engage with Habitat Omaha’s planned giving resources on their own time, creating a new pathway for supporters who may have had a connection to the organization but weren’t already part of its fundraising network. Of the estate plans completed through Habitat Omaha’s FreeWill tool, 31% include a bequest commitment, roughly five times the national average.

With FreeWill’s stock giving tools, donors can initiate gifts themselves rather than relying on Habitat Omaha staff to facilitate each transfer. The organization has also seen IRA giving grow significantly, with LeAnn describing the increase as “exponential.”

FreeWill has become a standard part of Habitat Omaha’s donor communications. Every newsletter includes a “more ways to give” section that links to the organization’s FreeWill

pages for stock, IRA, DAF, and other giving options, and the team uses embedded tracking links to understand how donors engage with these methods and to inform future fundraising strategies.

The FreeWill Marketing Library has also made it easier for the team to bring planned giving into events and community outreach. Habitat Omaha can quickly download and customize educational materials, add its own links, and print resources for homeowners and donors.

But the most meaningful shift has been in who participates in Habitat Omaha’s planned giving program. The organization initially expected the tool to primarily engage mid- and major-level donors. Instead, it began seeing legacy commitments from grassroots donors, anonymous supporters, and Habitat homeowners.

“At our annual dinner now, we have retired multimillionaires rubbing elbows and sitting next to single moms that are working three jobs,” Kassube said. “Both in the same society that want better for their community.”

Habitat Omaha has also connected FreeWill’s estate planning resources directly to its homeownership work through transfer on death deed (TODD) clinics. As more families became homeowners, the organization recognized the importance of helping them preserve their homes as generational assets and avoid the complications of probate.

Working with local attorneys and the Creighton Law Department, Habitat Omaha hosts clinics where homeowners can meet with an attorney, complete their paperwork, and establish a transfer on death deed. FreeWill’s Marketing

The Solution (CONTINUED)

Library provides educational materials about wills, computers are available for homeowners to create their wills on-site, and translators are available for those who need them.

For Habitat Omaha, these clinics turn estate planning into an extension of its mission: helping families build and preserve generational wealth.

“It’s about establishing new roots, it’s about establishing new lineage, and setting your blood, your kin up with a future,” Kassube said.

The impact has extended beyond Habitat homeowners, too. Habitat Omaha has received planned gifts from supporters across the country, including donors in Oregon, Texas, and New York who were previously outside its network.

What began as a search for a better stock giving tool has become a broader way for Habitat Omaha to connect donors and homeowners with tools to give, plan, and preserve what they’ve built.

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LeAnn Kassube
Development Systems Manager

Results

28

primary bequests

\$794K

in primary bequests

\$792K

in secondary bequests

\$680K

in stock commitments