FREEWILL

CASE STUDY | PLANNED GIVING

How a change to The National Multiple Sclerosis Society website & follow-up increased giving by **13X**



THE OPPORTUNITY

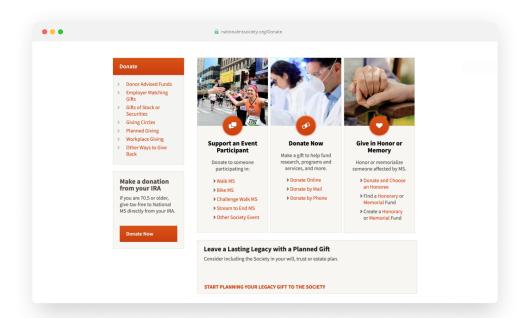
The National Multiple Sclerosis Society works to cure MS while empowering people affected by MS to live their best lives. Their small but dedicated planned giving team focuses on ensuring the Society has the funds it needs to power their mission now and into the future.

The team knew that donation options, such as Qualified Charitable Distributions and bequests, needed to be a bigger part of their fundraising plan since these gifts are larger and more impactful on average. And for many donors over 70 years of age, giving from their IRAs (a QCD) can also help them save on taxes. So they began looking for new ways to educate their older donors on smarter giving options as well as ways to make these complex donations easier to give.



Good donor stewardship includes educating and informing donors on all of their giving options, and the best ways to give. They're very appreciative.

Kathy Newsom Planned Giving Officer



THE SOLUTION

The National MS Society partnered with FreeWill to simplify the giving process and educate their donors. They receive dedicated landing pages from FreeWill where donors can fill out all the information they need to make a gift from their IRA, or complete their last will and testament and include a charitable bequest.

To promote these transformational, non-cash giving options where they'd be easily seen by donors, the team placed links to both their QCD and will-making tools on the main donate page of their website.

Now, when supporters land on their site and are ready to make a gift, they can learn about the most tax-efficient giving options for them. Once a donor begins a gift, the National MS Society team

can follow up and answer any questions, ensuring it's completed. This means that donors' gifts work better for them, and make a larger impact on supporting the end of multiple sclerosis.

This donor-centric approach has resulted in larger gifts and significantly boosted giving. By simply linking to these tools in a highly-visible area of their website and following up with donors, the organization went from seeing only \$7,000 in QCDs a year via their FreeWill site to more than \$98,000 in the following year — a 13X increase in real-time donations.

They also made planned giving simpler and more accessible, resulting in more than \$3.7 million in gift commitments over just two years.

RESULTS

\$3.7M in planned gifts

13X increase in QCD dollars

\$98K in real-time gifts