

An eye to the future:

How National Urban League is leveraging a partnership with FreeWill to build **generational legacies**



THE OPPORTUNITY

Founded in 1910, the National Urban League began as an initiative to help freed slaves find jobs and housing during the Great Migration. Since then, it has grown into a nationwide movement with 92 affiliate offices serving more than 300 communities across the U.S and improving the lives of nearly two million African Americans and people from other historically underserved groups each year.

In addition to housing and job assistance, they now support and advocate for education, equitable and affordable healthcare, and equal rights and justice for all people. Most of the National Urban League's fundraising initiatives had been focused on cash. While bequests would come in from time to time, planned giving wasn't an area for growth — until the organization's partnership with FreeWill.



Everyone has the ability to create their own legacy for generations to come. And that's really how we market it. We market that. Now you're helping the National Urban League continue to help individuals in need, not just in this moment but for years to come.



Topaz Spooner-Lay
Senior Manager of
Partnerships and
Advancement
Individual Relations

THE SOLUTION

Topaz Spooner-Lay, Senior Manager of Partnerships and Advancement Individual Relations, understands how planned giving could benefit the National Urban League's work.



We have a lot of people who are interested in our work, and they want to support our work. But they may not have the financial means to give us a couple of thousand dollars today.

But as a one-person major gifts team, she didn't have the bandwidth to bring a robust planned giving program to life. A partnership with FreeWill helped change that.

At first, there was concern about investing in an area that they hadn't tried to grow before. But with the help of FreeWill, Spooner-Lay and the National Urban League team have found an effective way to consistently communicate with their donors about legacy giving — resulting in over **\$3 million** in bequests since launching in early 2021.

The simplicity provided by both the stock and bequest tools have allowed Spooner-Lay to focus less on paperwork and more on what matters — building lasting relationships with donors.

"Before FreeWill, we would get a check in the mail, and that would be it. We didn't know it was coming, we weren't able to look at a forecast to

say we have these promises coming to us. But I think what's most important is to get to know that donor and that stewardship piece. So, having the information come through FreeWill enables us to develop a cadence. We mail quarterly updates, we've named our legacy circle, and we acknowledge these donors on our website. We keep the movement moving."

Now the organization's planned giving program has become an ongoing conversation, not just a static offering. The League has also built multiple ways to give, so donors can choose what feels right: direct mail, electronic communication, and even an easy-to-use QR code.



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They've also been able to expand their reach through the support of their staff and affiliate groups. Internal staff use the bequest tool themselves and, more importantly, share it with their families and friends. Affiliate groups are also encouraged to use both the bequest and stock tools, and share them with their communities.

The partnership with FreeWill has also had a positive effect on National Urban League's internal processes. The stock tool has streamlined

gift processing, making reconciliations more efficient for the finance team. The tool also provides robust donor information, helping Spooner-Lay easily manage and update donor records in the organization's CRM database.

LOOKING AHEAD

Through increased outreach to younger prospects, the League hopes to encourage donors of all ages to think about their generational legacy and how they can help the League continue serving individuals not just in this moment, but for years to come.



When you think of legacy and estate giving, it's really something that people think of for older people. And it's not. It really impacts the whole family.

With this in mind, she plans to actively engage younger audiences in the importance of estate planning — starting with the League's Young Professionals, a group of volunteers between the ages of 21 to 40.

“What I see is that we'll be able to use FreeWill with these young professionals to help them not only manage their money, but guide them to making an impact and paying it forward.”



It's important that you take a multi-tier approach and not just reaching out once a year. Prior to FreeWill, we would have one direct-mail postcard for planned giving in July. But with FreeWill, we're layering on top of that postcard. We also have Make-A-Will Month, and we have the New Year [campaign]. And in between, we have different Stock appeals that we do as well. So it's pretty much expanding the reach of the National Urban League, so that it all works in conjunction with our other campaigns.



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Senior Manager of
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RESULTS

\$3M+

in bequest commitments