

Embracing equity in planned giving:  
**How the YMCA of Greater Richmond raised \$1.2M in legacy commitments**



## THE OPPORTUNITY

The YMCA of Greater Richmond is committed to making their community a better place to live by serving children and families through each of their 18 branches. Their 1854 legacy society had experienced some growth in recent years due to a renewed focus on planned giving, but the program had started to stall. They had their marketing covered but were in need of additional support, and a way to prompt action from supporters in order to have a more robust program.

## THE SOLUTION

In January 2020, the YMCA of Greater Richmond launched the Planned Giving Suite through their partnership with FreeWill, allowing them to grow their planned giving strategy beyond mere solicitation and offer a true value-add for members.



This relationship is essentially turnkey. These are gifts that have come with little to no effort, and if we put the effort into stewardship, the more it will return. The ROI has been exceptionally valuable and that's easily proven.

**Elaina Brennan**  
Director of Philanthropy Operations

## THE SOLUTION (CONTINUED)

Through the Planned Giving Suite, the Y is able to provide its supporters with a link to a co-branded landing page where they can create their wills for free and select the YMCA of Greater Richmond as a beneficiary. With the support and expertise provided by their Partner Success Strategist, the Y has received 134 primary bequest commitments estimated at \$1.2 million throughout the duration of their partnership.

The partnership has facilitated the YMCA of Greater Richmond in strengthening bonds with existing major donors and nurturing relationships with new legacy donors. It's also inspired non-donors to consider legacy giving for the first time. One volunteer learned of the opportunity by helping the team with their acknowledgment process, and was inspired to leave a legacy gift to the Y when learning of the opportunity.

As Director of Philanthropy Operations Elaina Brennan describes it: "Even though that gift didn't come through FreeWill, I attribute it to the FreeWill relationship. It keeps the conversation at the forefront and invites others to think about their own planned gifts."

In everything they do, the Y aims to create accessibility for all individuals in their community. Brennan sees FreeWill as proof of that: "It aligns with our mission and values. Having something like FreeWill allows us to talk about our commitment to equity, and it's one other way that we're providing an equitable benefit to our members."

In their first 3 years of partnership, the YMCA of Greater Richmond has helped over 840 individuals complete their estate plans, providing a vital resource to their community, and completely revived their planned giving program in the process.



Having access to data from FreeWill allows for us to be more confident in donor conversations.

**Elaina Brennan**  
Director of Philanthropy Operations

## RESULTS

**\$1.2M**

in primary bequest commitments

**134**

primary bequest commitments