

FreeWill Stewardship Templates



Bequest Donors

This template is designed for outreach to donors who have drafted their online estate plan but they may still be in the process of finalizing their plans.

Note: We recommend contacting donors who have an existing relationship with your organization and/or have a personal connection to a gift officer. For donors without a prior relationship, we recommend waiting until their plans are downloaded before reaching out to them.

Subject: [Reply requested] Take the next step to make your impact, [NAME]

Alternative: Let us know how to keep in touch, [NAME]

Body:

Hi [DONOR NAME],

My name is [ORGANIZATION REPRESENTATIVE NAME] and I am the [TITLE] at [ORGANIZATION]. I'm reaching out because you recently started a gift intention to us in your will or trust when you made your estate plans with FreeWill. First, please know we understand your plans are in progress, and not yet finalized. Whatever you ultimately include in your plans, we are so grateful you considered [ORGANIZATION/MISSION] as part of your lasting legacy.

If completed, your gift may help [BRIEF MISSION STATEMENT ex: provide critical services to children in foster care, and will help them be healthy, safe, and loved] for generations to come.

Lastly, if we can ever be of service as you finalize your plans, please feel free to reach out to me at [PHONE] or [EMAIL]. You can also reach out to support@freewill.com with any questions or [watch this video](#) to review how to print your documents.

With gratitude,
[NAME]