

FREEWILL PARTNER TRAINING

Planned Giving Marketing (102)



Planned Giving Certificate



Our optional certificate program is offered to FreeWill partners at no cost

Complete these requirements to receive a Certificate of Completion and an invitation to add the accomplishment to your LinkedIn profile

- Planned Giving Basics (101)
- Planned Giving Marketing (102)
- Planned Giving Conversations (103)
- Planned Giving Solutions (104)
- Planned Giving Stewardship (105)
- Final online quiz

Eligible for 5.0 CFRE continuing education credits



Agenda

- 01 Reasons to invest in proactive planned giving marketing
- 02 Planned giving on the web
- 03 Standalone planned giving outreach at key times of year
- 04 Planned gift mentions in existing outreach
- 05 Putting it all together in a campaign
- 06 Resources & next steps



01 Reasons to invest in proactive planned giving marketing



Why planned gift marketing?

Because it works! Proactive planned gift outreach accomplishes several things:

1. **Provides ongoing donor education** about the importance of having an estate plan and donors' options for deferred giving
2. **Positions planned gifts** as easy to establish and a meaningful way to leave a legacy
3. **Drives traffic** to your planned giving page/website
4. **Identifies leads** for further cultivation and stewardship
5. **Secures new gift commitments** for your nonprofit – especially when you share a tool that helps donors easily make their plan and leave a gift!



But we need money now

Back-benching planned giving outreach is short-sighted:

- Planned gifts are often the largest and most meaningful donation of a donor's life – the typical planned gift is 200x the size of a donor's largest annual gift
- Your planned giving prospect pool is likely to be 5x larger than your typical campaign pool
- The average time from planned gift inception to maturity is 7-10 years
- Legacy gifts create a sustainable funding pipeline that helps you plan confidently for the future
- **Donors who make bequest commitments are more likely to [increase their annual giving!](#)**



02

Planned giving on the web



Key guidelines

Adding planned giving and your FreeWill products to your website is highly effective

Where to integrate?

- **Dedicated *Planned Giving* page:** Ensure donors can find this info quickly and easily
- **Vendor-administered planned giving site:** Work with FreeWill or other vendors to create & maintain planned giving webpages*
- **Ways to Give page:** This should not be your only web integration but is another way to direct supporters to FreeWill



What the data says

Web content is the #2 driver of new bequests

→ The #1 driver is standalone email outreach

Of all web links that have successfully generated gifts, more than $\frac{1}{3}$ are on a dedicated *Planned Giving* page (the highest proportion for any page)

On average, *Planned Giving* page links generate almost 2x as many bequests as other pages, like *Ways to Give*

Ensure people can find your *Planned Giving* page from anywhere on your site by linking it in the top-line navigation



Planned Giving page

Explain the benefits of having a will or trust in place

Frame your FreeWill product as an easy way to get started

Place links to your FreeWill products “above the fold”
(placement on the page matters)

Define planned giving, avoiding technical language, jargon, or words that reference mortality

Instead of “Bequests” or “Estate Planning”
→ Try: *“Gifts in wills”* or *“Legacy Giving”*

Instead of “Make a bequest gift to charity”
→ Try: *“Make a gift to charity in my will”*

Instead of “Leave a legacy”
→ Try: *“Create a legacy”* or *“Build a legacy”*



Planned Giving page

Consider highlighting:

- How to join your legacy society & the benefits of membership
- Video content, like FreeWill's animated [explainer videos](#)
- A testimonial from a living legacy society member
- The option to leave a percentage of their estate, rather than a specific dollar amount – percentage gifts are more flexible for donors (the gift value is based on their estate value)
- The option to make a planned gift in honor or in memory of a loved one



Sample: Planned Giving page

Effective choices:

- Mission and impact language
- Frames their FreeWill tool as “quick and easy” to use
- Link to their will-writing tool is above the fold
- Shares a link to their Gift Intent Form, as well



Create a Legacy

When you name our organization as a beneficiary, you're giving renewed life to your passion for helping the animals who need us most. Legacy gifts allow you to impact the lives of vulnerable shelter animals, giving them a second chance at life.

This online resource, courtesy of FreeWill, makes it quick and easy to include a legacy gift in your plans to Austin Pets Alive!. You can write your will in 20 minutes or less at no personal cost, and include the necessary language to save animals for years to come.

If you've made the decision to leave a legacy gift, please include the following information in your bequest or beneficiary documents:

Our legal name: Austin Pets Alive

Our EID (tax ID number): 74-2893360

Our current address:

1156 W. Cesar Chavez Street, Austin, Texas 78703

[Write My Free Will](#)

If you've already created a legacy gift to Austin Pets Alive!, **please fill out this form** to let us know so we can thank you for your generosity!

Ensuring Care for Your Pets After You're Gone

Austin Pets Alive! may be able to help if you have no one you trust to care for your pets after you pass away.

Please note that this program requires a bequest agreement and that some restrictions apply. Please contact us for more information.

[Contact Us](#)

Sample: Planned Giving page

Effective choices:

- Explanatory headers
- Link to their FreeWill bequest product is above the fold
- Calling out FreeWill a second time under the “Helpful Resources” header
- Info and a video about their legacy society, with a video testimonial

Support PBS Wisconsin
Focus Funds Individual Gifts Legacy and Planned Giving Corporate Support Volunteer More Ways To Support Contact

HERITAGE SOCIETY | HERITAGE SOCIETY MEMBERS | YOUR GIVING OPTIONS | ENDOWMENT

LEGACY & PLANNED GIVING
Legacy and Planned Giving

A planned gift lets you support PBS Wisconsin beyond your lifetime. By including a charitable component in your estate or financial plans, you are ensuring the future of public television for generations to come. Explore our site to learn more.

HOW TO GET STARTED
No matter your stage in life, it is never too early to think about your future and plan for how your affairs will be handled when you are gone. With just a few simple steps and legal instructions, you can have peace of mind for tomorrow.

Explore your planned giving options, or use this online tool to create your estate plan for free, and include a legacy gift to PBS Wisconsin. Courtesy of our partnership in FreeWill, this tool guides you through the process in 20 minutes or less and makes it easier than ever to join our Heritage Society with a lasting commitment to public media. Start writing your free will here.

HOW WILL YOU USE MY GIFT?
Unless otherwise specified by the donor, legacy gifts to Friends of PBS Wisconsin are added to an Endowment to ensure the future of PBS Wisconsin for generations to come. The Endowment is invested strategically to preserve its principal value, and annual payout from the Endowment supports PBS Wisconsin's programs and operations. As our Endowment grows, it provides an expanding source of stable funding to help us weather the ups and downs of the economy and keep PBS Wisconsin strong and creative.

[Learn more about the Endowment](#)

WHAT IS THE HERITAGE SOCIETY?
The Heritage Society recognizes, honors, and celebrates extraordinary individuals who remember PBS Wisconsin in their estate or financial plans. Their visionary commitment will build public television's future on our legacy of quality, innovation, and service to Wisconsin.

[Learn more about the Heritage Society](#)

Helpful Resources

- [Inform us of your planned gift](#)
This confidential form will ensure your gift intentions are fulfilled.
- [Suggested Bequest Language \(PDF\)](#)
Download this template to add a charitable component to your plans.
- [Freewill](#)
A free and secure online tool to write your legal will today.

Legal Name and Tax ID
Friends of PBS Wisconsin, Inc.
821 University Ave, Madison, WI 53706
Federal Tax ID: 23-7300462

MEET OUR HERITAGE SOCIETY MEMBERS

Joe and Jeanne Silverberg
Together, Joe and Jeanne have watched and learned from PBS Wisconsin for many years. They wanted to include this important part of their lives in the legacy they leave behind.

[Meet More Heritage Society Members](#)



Ways to Give page

If space permits, include a sentence about how planned gifts impact your nonprofit

Frame your FreeWill product as an easy way to get started

Avoid technical language, jargon, or words that reference mortality in section headers

Link directly to your FreeWill product or to your *Planned Giving* webpage so people can learn more



Your investment in lifesaving research propels the important work of the more than 54,000 members of the American Association for Cancer Research in driving progress against cancer. Here are some ways you can contribute:

WHERE YOUR MONEY GOES

Donate

Your gift to the American Association for Cancer Research (AACR) supports lifesaving cancer research.

DONATE TODAY



Sustaining Hope Club: Monthly Giving

A commitment to a monthly donation provides ongoing support for lifesaving cancer research. Monthly donors are part of our Sustaining Hope Club.

LEARN MORE



Plan Your Legacy

A legacy commitment to the American Association for Cancer Research (AACR) ensures a lasting impact on scientific discovery and innovation in the treatment and prevention of cancer for generations to come.

LEARN MORE



Sample: Ways to Give page

Effective choices:

- Jargon-free header
- 1-2 sentences of context
- Nice visuals
- Clear CTA button
- Links to their *Planned Giving* webpage



Sample: Ways to Give page












Effective choices:

- Many giving options visible at once
- Jargon-free headers
- Icons help make the info easy to scan and digest
- Links directly to their FreeWill product

Creating a Thriving Community Free of Hunger



Everyone has a role in ending food insecurity in Connecticut. When you give to Connecticut Foodshare, your donation will go directly to providing nutritious food and other resources to our neighbors in need throughout Connecticut. Thank you.

 <p>DONATE FUNDS</p> <p>Donate now to help create a community free of hunger.</p>	 <p>GIVE MONTHLY</p> <p>Increase your impact when you give monthly.</p>	 <p>GIVE BY MAIL</p> <p>Mail your donation to: Connecticut Foodshare 2 Research Parkway Wallingford, CT06492</p>
 <p>MAKE A TRIBUTE</p> <p>Honor someone special with a gift in honor or memory.</p>	 <p>EMPLOYER MATCH</p> <p>Check to see if your employer will match your donation.</p>	 <p>DONOR ADVISED FUND</p> <p>Designate your gift to Connecticut Foodshare with your DAF.</p>
 <p>IRA DISTRIBUTION</p> <p>Make a gift using a qualified charitable distribution from your IRA.</p>	 <p>GIFTS OF STOCK</p> <p>Make a gift of stock to help fight hunger.</p>	 <p>CRYPTO</p> <p>Donating cryptocurrency can bring you tax benefits while helping to fight hunger.</p>
 <p>LEGACY GIFTS</p> <p>Support hunger relief with a planned gift.</p>	 <p>DONATE FOOD</p> <p>Food drives are vital to fighting hunger.</p>	 <p>VIRTUAL FOOD DRIVE</p> <p>Start your own or support an existing virtual food drive.</p>



Sample: Ways to Give page

Effective choices:

- Compelling visuals
- Jargon-free header
- Links directly to their *Planned Giving*/legacy society page

More Ways to Give

Whether you are remembering a loved one or looking to sponsor Alvin Ailey American Dance Theater, we offer many options for additional giving.



Corporate Support



Honorary or Memorial Gifts



Planned Giving



Opportunities for Young Patrons



Masazumi Chaya Fund



Parents Annual Fund



Jamison Women of Ailey Fund



Other Ways to Give

Learn how to make a donation via [wire transfer, transfer of stock, IRA rollover, and more.](#)

Give by Mail

Make checks payable to Alvin Ailey Dance Foundation, Inc. and mail to:

Alvin Ailey Dance Foundation, Inc.
Attn: Development Department
The Joan Weill Center for Dance
405 West 55th Street, 4th Floor
New York, NY 10019



Sample: Planned Giving page

- Link to FreeWill is above the fold
- Shares a link to their Gift Intent Form, as well
- Contact info for questions

Ailey Legacy Circle

The Ailey Legacy Circle recognizes and honors the generous donors who have made a bequest or other planned gift to Ailey, they support Ailey's inspiring performances around the globe, world-class training programs, and innovative arts-in-education initiatives and community programs through a gift that offers financial flexibility in their lifetimes, and marks their permanent legacy supporting the arts.

Legacy Circle members enjoy special year-round benefits including recognition in Ailey's printed materials, invitations to donor events and rehearsals, and passes to the VIP Lounge during Alvin Ailey American Dance Theater's [New York City Center season](#).

Ailey accepts many types of planned gifts that can help you leave your mark on the organization while prioritizing your family's needs now and in the future. The most common planned gifts to Ailey are [bequests and beneficiary designations](#).

Where do I start?

FreeWill will guide you through a step-by-step process of creating your will or trust. Visit freewill.com/alvinailey to get started today.

Visit FreeWill

What do I need?

You might need this information below to include Ailey in your estate plans.

Sample Language: I give to Alvin Ailey Dance Foundation, a nonprofit corporation currently located at 405 West 55th Street, New York NY 10019, or its successor thereto, _____ [written amount or percentage of the estate or description of property] for its unrestricted charitable use and purpose."

Official Name: Alvin Ailey Dance Foundation, Inc

Address: 405 West 55th Street, New York NY 10019

Tax ID Number: 13-2584273

Email for contact: patronengagement@alvinailey.org

Have you already created a gift in your will or trust to Ailey?
[Fill out this form to let us know.](#)

Questions?

Please contact the Ailey Development Office if you need assistance with your planning.

- Email: patronengagement@alvinailey.org
- Phone: [212-405-9033](tel:212-405-9033)



Sample: Vendor-managed pages

If your planned giving microsite vendor allows links to third party sites, add links to your FreeWill tools there

If not:

- Create a dedicated *Planned Giving* page on your own website
- Link to your FreeWill product and, separately, to your planned giving webpages



Leave a Legacy



Write Your Will & Leave a Legacy

AHS is honored to offer a new resource to help you protect what you love, called FreeWill. This online tool allows you to write your legal will, at no cost to you.

[Learn More →](#)

Explore Your Many Planned Gift Options

If you would like to extend your support of Austin Humane Society to make a lasting impact, there are several gift arrangements to choose from.

[Learn More →](#)

Building Compassion Capital Campaign

Want to be a part of the future of AHS? Click here to learn more about our Building Compassion Capital Campaign.

[Learn More →](#)

Endowment

The Austin Humane Society established the Every Animal Fund in 2008, a permanent endowment fund for AHS at the Austin Community Foundation.

[Learn More →](#)

Sample: Vendor-managed pages

Another option:

Use your *Ways to Give* page to link to your FreeWill product and, separately, to your planned giving webpages

WAYS TO GIVE



DONATE ONLINE



Have **immediate impact** and make your gift online!

DONATE NOW

givetobia@brailleinstitute.org
 [\(800\) 272-4553 x1238](tel:(800)272-4553)

DONATE BY MAIL



You can **mail your gift** to the address below – please do not send cash or coins.

ATTN: Development Department
741 N. Vermont Avenue
Los Angeles, CA 90029

MAKE A PLANNED GIFT



Learn about how an estate gift can **benefit both Braille Institute and your family.**

LEARN MORE

plangift@brailleinstitute.org
 [\(800\) 272-4553 x1256](tel:(800)272-4553)

Gifts of less than \$25 will not receive a receipt and your cancelled check is your receipt. Please contact us if you'd like an electronic or paper version.



WRITE A LEGAL WILL OR TRUST FOR FREE

We've partnered with FreeWill to help you write a legal will or trust for free. This process makes it simple to protect the people you love. **Create your free plan** and get peace of mind for the future.

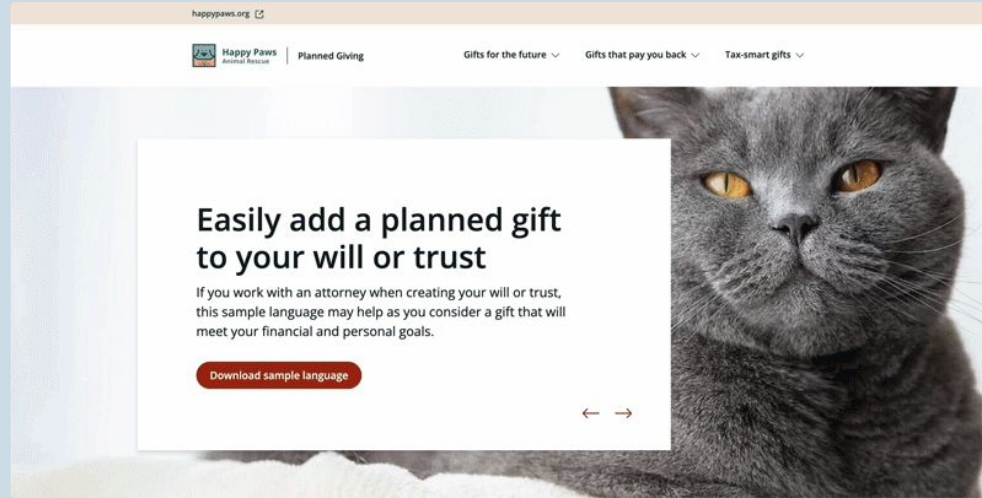
GET STARTED



Sample: FreeWill planned giving microsite

A space for your donors to learn and give, in one sitting

- Clean, modern design with streamlined navigation
- Direct integration with FreeWill products and those of other vendors so you never miss a gift
- Flexible and tailored to your organization's visual identity and needs
- Donor-centric messaging, influenced by Dr. Russell James' research and years of validated best practices



<https://demo.mygiftlegacy.org/>

Available gift types

(and counting!)

Gifts for the future

- Gifts in a Will or Trust*
- Beneficiary Designations*
- Charitable Gift Annuities
- Charitable Remainder Trusts
- Pooled Income Funds
- Charitable Lead Trusts

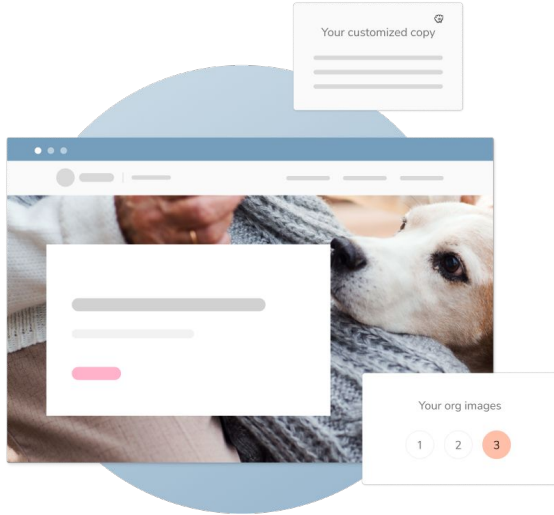
Gifts for today

- Stock, Securities, and Mutual Funds*
- Cryptocurrencies*
- QCDs*
- Donor Advised Funds*
- Personal Property
- Real Estate

The sections marked with * can link directly to your related FreeWill tools if applicable. If you do not have a corresponding FreeWill tool they can link to a third party tool or page, or include language with contact information or guidance.



Customization options



Tailor the site to match your brand and provide a seamless experience from your main site to the Planned Giving Microsite

The following are all customizable components:

- ✓ Logos, fonts, & color schemes
- ✓ All images on the site
- ✓ Language & links for the hero carousel
- ✓ Language specific to your mission and programs
- ✓ Donor testimonials
- ✓ FAQ section
- ✓ Downloadable guides & sample language



Sample: Homepage feature

Effective choices:

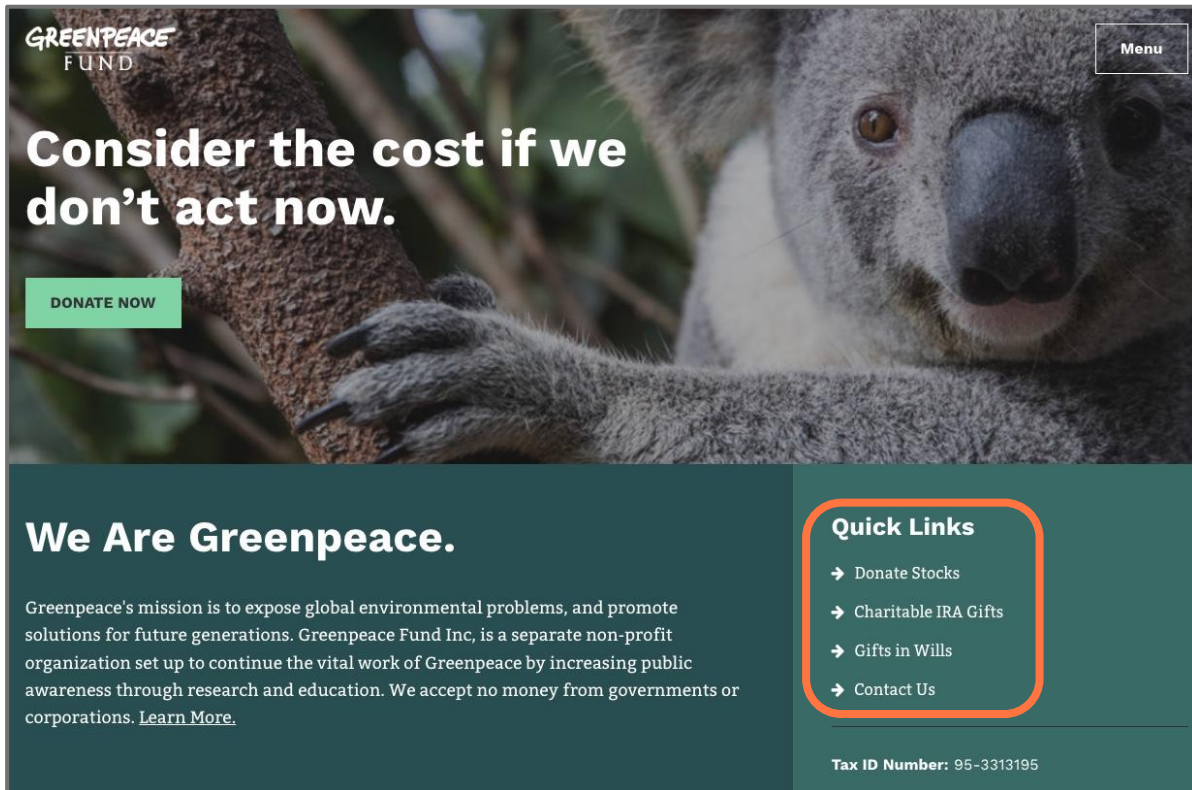
- Leveraged an attention-grabbing feature during a specific FreeWill outreach campaign
- Linked directly to their FreeWill product
- You might choose to try this as a pop-up instead



Sample: Homepage feature

Effective choices:

- Simple, clean integration right on their homepage
- Planned and smart giving options are spotlighted
- Links go directly to their FreeWill products



GREENPEACE FUND

Consider the cost if we don't act now.

DONATE NOW

We Are Greenpeace.

Greenpeace's mission is to expose global environmental problems, and promote solutions for future generations. Greenpeace Fund Inc, is a separate non-profit organization set up to continue the vital work of Greenpeace by increasing public awareness through research and education. We accept no money from governments or corporations. [Learn More.](#)

Quick Links

- Donate Stocks
- Charitable IRA Gifts
- Gifts in Wills
- Contact Us

Tax ID Number: 95-3313195

Menu



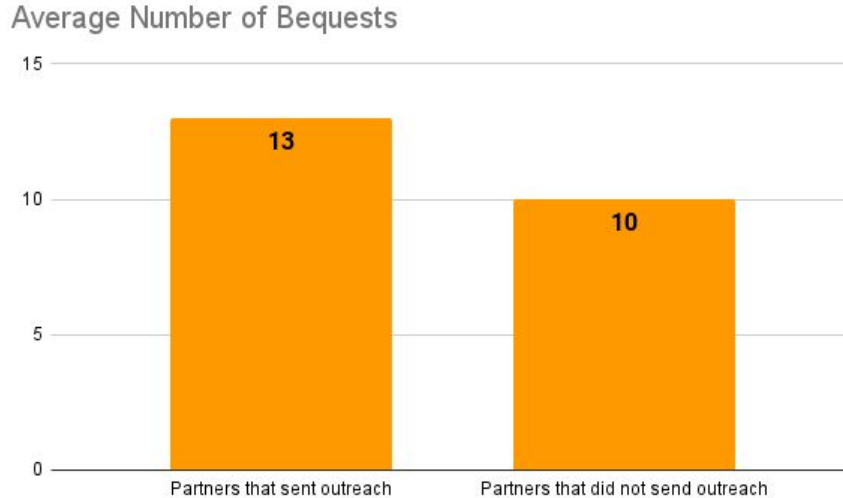
03

Standalone planned giving
outreach at key times of year



Bequest outreach

In 2023, how did sending content impact partner success?



Partners that sent bequest outreach received about 30% more bequests than those that did not.

Takeaway:
Sending regular bequest outreach continues to be a best practice!



High energy moments for planned giving outreach

January

New Year's Resolutions

May

Spring cleaning/Springtime renewal/Plant a seed

August

National Make-A-Will Month

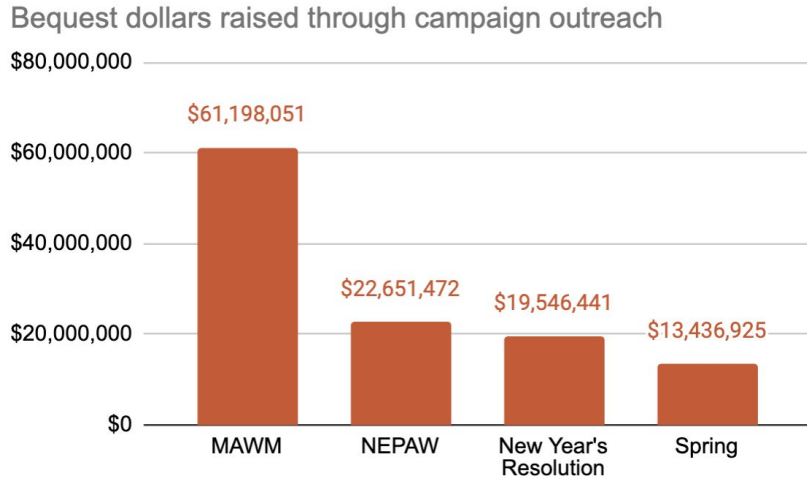
October

National Estate Planning Awareness Week



Campaign success

How did our major bequest campaigns compare in 2022?



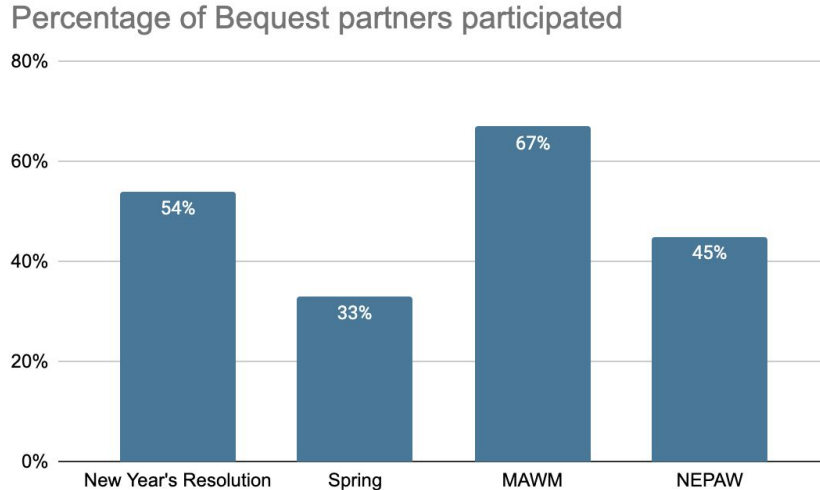
National Make-A-Will Month (MAWM) outpaced every other major bequest campaign in terms of total bequest dollars raised through outreach.

Takeaway:
MAWM remains our #1 campaign recommendation for bequest partners



Campaign participation

Which bequest campaign was most popular with partners in 2022?



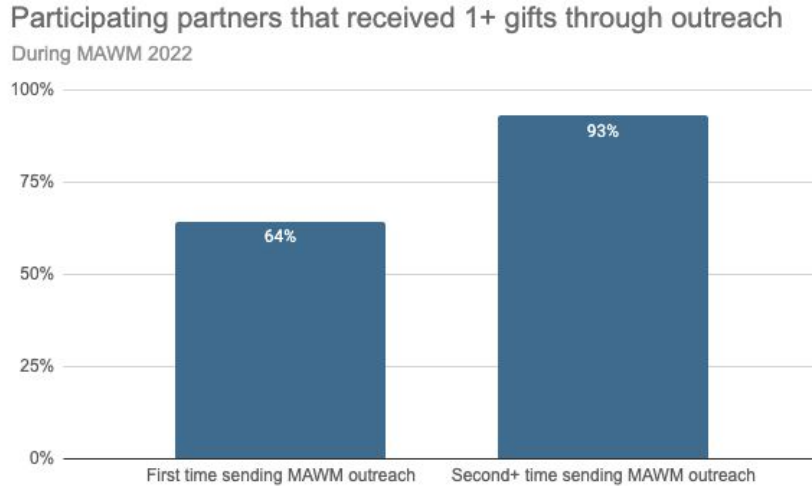
Partners prioritize National Make-A-Will Month (MAWM), since it's our top-performing campaign year over year.

Takeaway:
MAWM is a recommended outreach campaign for all bequest partners



Gift performance x tenure

How did repeating MAWM in 2022 impact performance?



During MAWM, partners that were repeating the campaign were more likely to receive gifts through their outreach.

Takeaway:

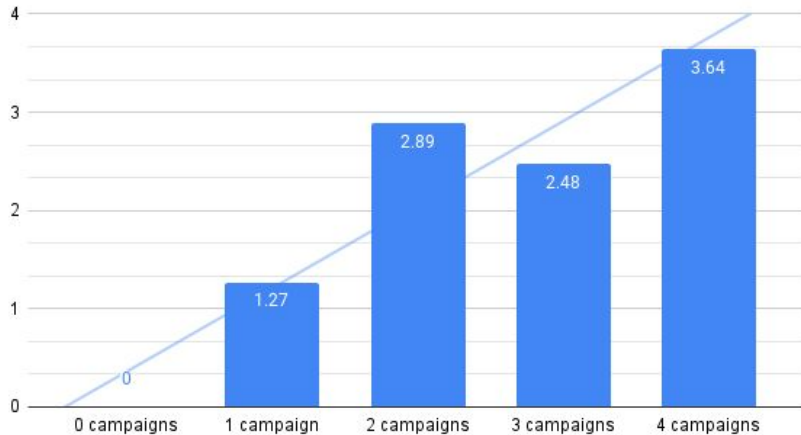
If you are heading into year 2+ with FreeWill, we'll recommend you repeat your strongest campaign(s) from previous years



Number of campaigns

How did ROI correlate with the number of bequest campaigns sent in 2023?

Median ROI vs. Bequest Campaigns Sent



In general, ROI rises as the number of campaigns sent increases. Partners that sent 4 bequest campaigns had the highest median ROI.

Takeaway:

For most partners, we'll recommend sending 4 bequest campaigns in 2024

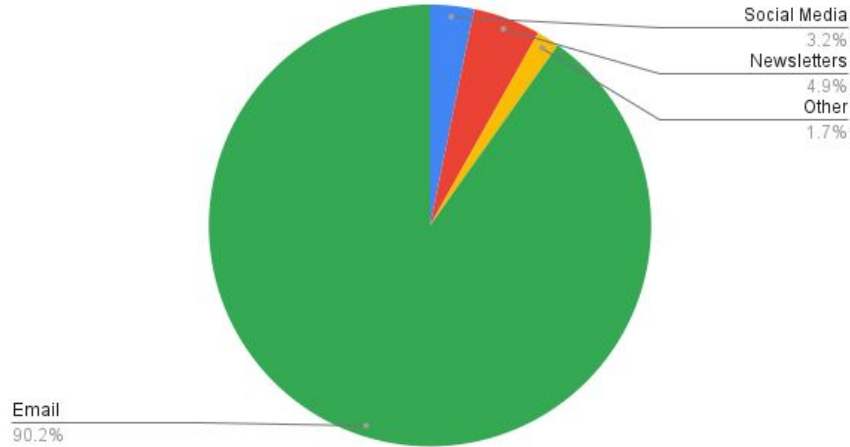
As we cut this data by partner size and other factors, the goal number of campaigns shifts. Your Strategist will recommend **your personal goal based on a deeper data dive!*



Campaign channels

Which types of outreach impacted success in 2023?

Percentage of 2023 outreach from each channel



In 2022, social media, newsletters, and integrations generated 7% of all bequests from content

In 2023, we shifted our strategy to focus more on emails, providing pre-written integrations in the Content Center

Takeaway:

Email remains our #1 recommendation and priority for custom content

Additional integrations are important for education and awareness building and will remain in your Content Center

AFP Foundation for Philanthropy

Launch email

Subject: A new resource for our members

Best practices followed:

- Clear CTA in a button
- Signed from an individual in the organization
- Emphasizes gratitude to the reader
- Tailored to organization's specific audience



A New Resource for Our Members

Dear Adrian,

I am so grateful for the support, and impact YOU make every day on the future of philanthropy.

From scholarships to networking to leadership development and more, the steps we take today as fundraisers impact the future of philanthropy. [As a benefit to our members, I'm excited to introduce a new partnership with FreeWill to support your own future through their free estate planning tools.](#)

No matter what stage of life you're in, an estate plan is an important document to dictate your personal and charitable decisions for the future. The AFP Foundation for Philanthropy invested in this partnership to support our members with this important task.

[Create My Free Plan >>](#)

Many of you may be familiar with FreeWill by name or because your organization partners with them. Their estate planning tools have helped 715,000 people create a plan to protect the people and causes they value, 100% cost-free.

I know self-help estate planning tools aren't for everyone, but I hope this resource can be a helpful launching point for our members as you consider your future.

On behalf of everyone at The AFP Foundation for Philanthropy, thank you for supporting our future, and the future of fundraising.

Sincerely,

A handwritten signature in black ink that reads "Lori Gusdorf".

Lori Gusdorf, CAE
Executive Vice President


Mississippi Public Broadcasting Foundation

Make-A-Will Month email

Subject: When will you create your plan, [NAME]?

Best practices followed:

- Engaging subject line
- Header image
- Clear call to action (CTA) in a button
- Includes social proof
- Combines information about MAWM/estate planning with a soft legacy ask
- Short & concise

 **Want to see your content here next time?** Let your strat know if you consent to share your organization's content examples externally for the purpose of discussing learnings and insights – for presentations like this!



Dear Elizabeth,

August is coming to a close, which means so is Make-A-Will Month! This month we're encouraging every Mississippian to take a confident step into their future with FreeWill: [a free estate planning service](#) we're sharing to thank you for your support of MPB.

More than 125 MPB viewers and listeners have secured their futures using FreeWill, and now is the perfect time to join them. You can rest assured, knowing your plans will:

- Care for and protect your loved ones
- Empower you to make important decisions, on your own terms
- Safeguard MPB for future generations of Mississippians, with an optional charitable bequest.

Create my free will

I hope this monthlong event encourages you and your loved ones to create your plans and get peace of mind for the future. Thank you for loving MPB as much as we do!

Humane Society of Charlotte

NEPAW Email

Subject: Let's make a lasting legacy together

Best practices followed:

- Custom email header
 - You can customize available assets like this in FreeWill's [Marketing Library](#)
- Clear CTA in button
- Written from an individual in your organization
- Educational tone
- Emphasizes gratitude to the reader



It's National Estate Planning Awareness Week

As we near giving season, HSC is excited to offer a way to support companion animals at no cost today.

FREEWILL



Greetings!

Are you prepared for your animal companion?

October 17 - 23 is National Estate Planning Awareness Week! As we near the giving season, the Humane Society of Charlotte is excited to offer a way to support homeless animals at no cost today.

Our friends at FreeWill have created a warm, intuitive, and completely free estate-planning tool, allowing you to create a legacy of meaning for vulnerable animals in your will or Revocable Living Trust.

[Make My Plans](#)

Whether it's taking your furry friend for more walks or volunteering at the HSC, the simple actions we take today can make a difference for our pets in the future. Having a plan for your loved ones is a meaningful act of care that you can accomplish today!

I invite you to support the HSC with a legacy gift in your plans to ensure that no pet feels alone or abandoned for years to come.

Please know that whether or not you decide to include a gift in your plans, FreeWill is 100% free to you and your loved ones.

Thank you for your consideration and continued support,

Donna C. Stucker

Donna C. Stucker
Chief Philanthropy Officer

RedRover

Make-A-Will Month A/B Test Emails


Testing engagement:

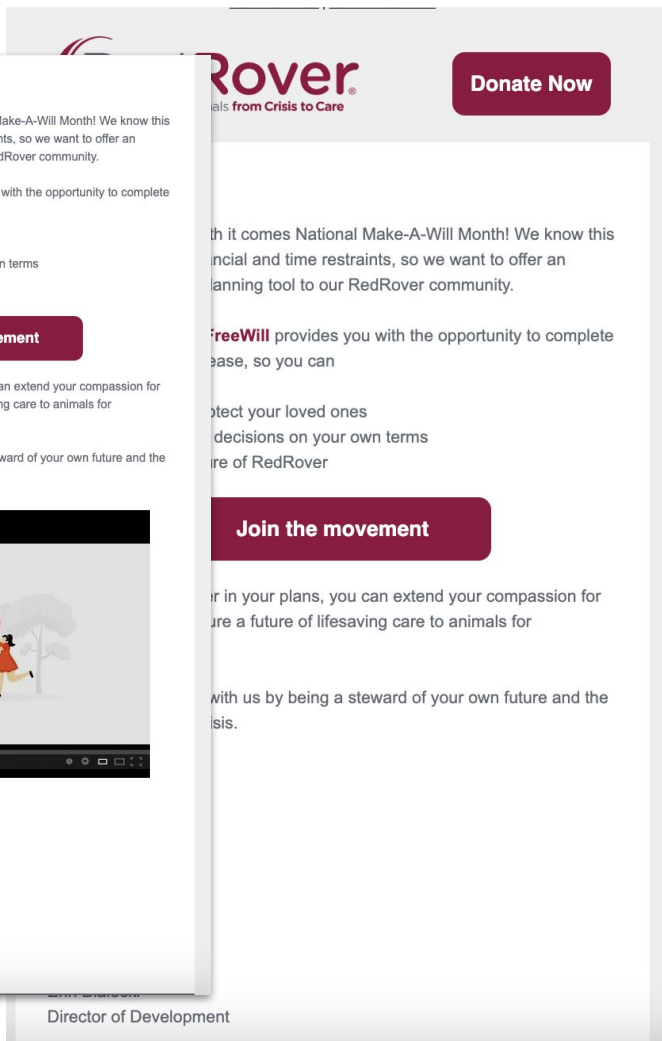
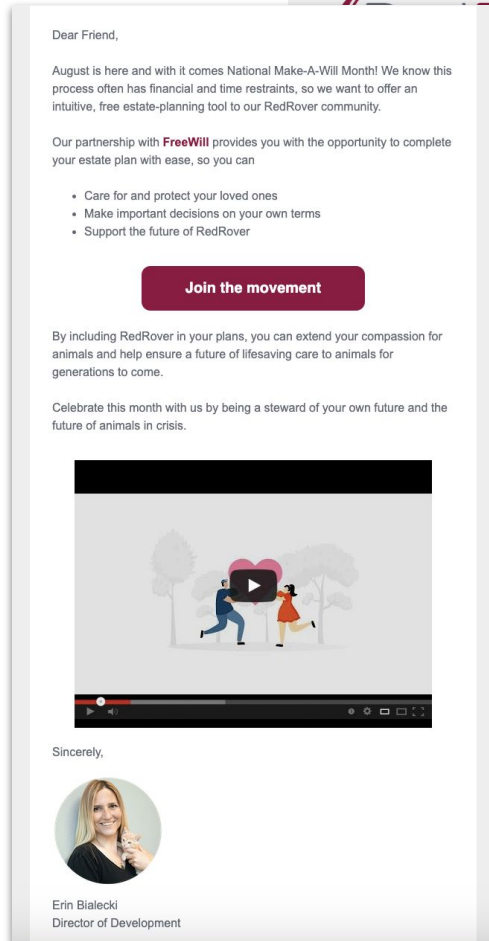
Email A **with** FreeWill bequest video & Email B **without** video

Subject: Make-A-Will month: Plan your legacy

Best practices followed:

- Test experiment executed perfectly
- Clear CTA in button
- Concise message
- Written from an individual at the org

 **Want to see your content here next time?** Let your strat know if you consent to share your organization's content examples externally for the purpose of discussing learnings and insights – for presentations like this!



National Forest Foundation

New Year's Resolutions E-Newsletter

Subject: Our New Year's Resolution - Save the Forest!

Best practices followed:

- Clear image that connects donors to the cause
- Posing a question to engage the reader
- Resource framing with a soft ask that mentions a specific impact

Partnership Highlight



Plant a Seed of Hope Today

Looking to set your intentions for 2023? To help you get started, we're highlighting our partnership with [FreeWill – a secure, online estate planning resource](#) that allows you to plan for your future, protect your loved ones, and even plan a gift to support the restoration and enhancement of National Forests and Grasslands for generations to come. [Click here to create your free will today!](#)



Want to see your content here next time? Let your strat know if you consent to share your organization's content examples externally for the purpose of discussing learnings and insights – for presentations like this!

Millikin University

Make-A-Will Month / Launch Social Post

Send Date: July 31, 2022 at 5:00 PM

Best practices followed:

- Educational FreeWill video
- Concise message
- Specific segmented audience

Millikin University Alumni
July 31 at 5:00 PM · 🌐

August marks National Make-A-Will Month! It's the perfect time to think ahead to care for your family and your future. To help you with this process, you can start your free will today thanks to Millikin's new partnership with FreeWill.

Protect those you love while creating opportunities for Millikin students through a planned gift:
<https://bit.ly/3yID92n>

pet, or a loved one is by
having an estate plan in place?

✓ Last Will & Testament
✓ Beneficiaries

FREEWILL.COM
Introducing FreeWill, a Millikin partner [Learn more](#)

👍❤️ 20 3 Shares



Want to see *your content here next time*? Let your strat know if you consent to share your organization's content examples externally for the purpose of discussing learnings and insights – for presentations like this!

Oklahoma Humane Society

Make-A-Will Month Social Post

Send Date: August 15, 2022 at 2:57 PM

Best practices followed:

- Educational tone
- Social proof
- Donor testimonial in video format



Want to see *your content here next time*? Let your strat know if you consent to share your organization's content examples externally for the purpose of discussing learnings and insights – for presentations like this!

Oklahoma Humane Society ✓
August 16 at 2:57 PM · 🌐

August is National Make-A-Will Month!

You can join the movement of 550,000+ people who have used FreeWill to protect the people, animals, and causes they love and make a lasting difference.

FreeWill is a self-help estate planning resource that the Oklahoma Humane Society partners with to offer our community the opportunity to write a legal will for free. Using FreeWill, you can write your will in 20 minutes or less and create a plan that protects what you love most.

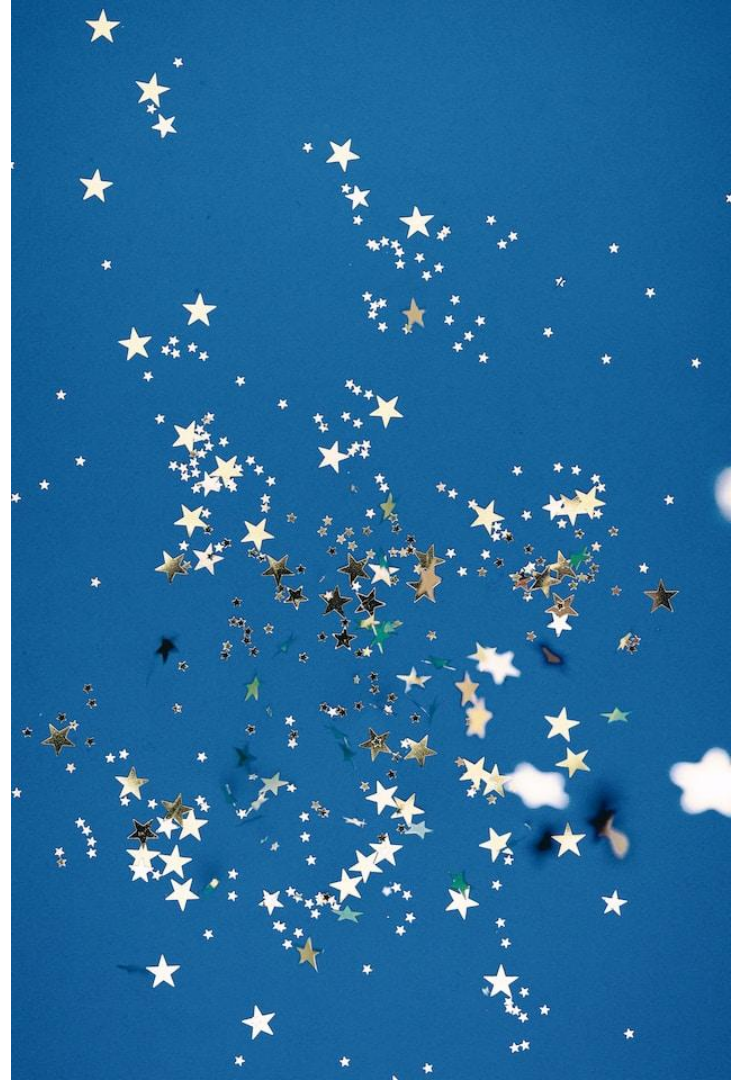
Get started here: <https://bit.ly/3QSogTI>

23
10 Comments 3 Shares

Let's review: Top bequest recommendations for 2024

- **Keep your focus on email!** Email is the top generator of new planned gifts through FreeWill
- **Align with your Strategist on the optimal number of campaigns for your nonprofit** – we have a lot of data to work with, and your Strategist will use it to make a custom recommendation
- **MAWM is still our top campaign** — be sure to hold space on your August outreach calendar
- **Repeating campaigns can benefit you**, and your donors
- **Testing is key** – running your own A/B tests, or participating in FreeWill's, helps identify what works for your audience

[Best practices for bequest outreach](#) | [Guide to A/B testing](#)



Complement your digital outreach with a print campaign

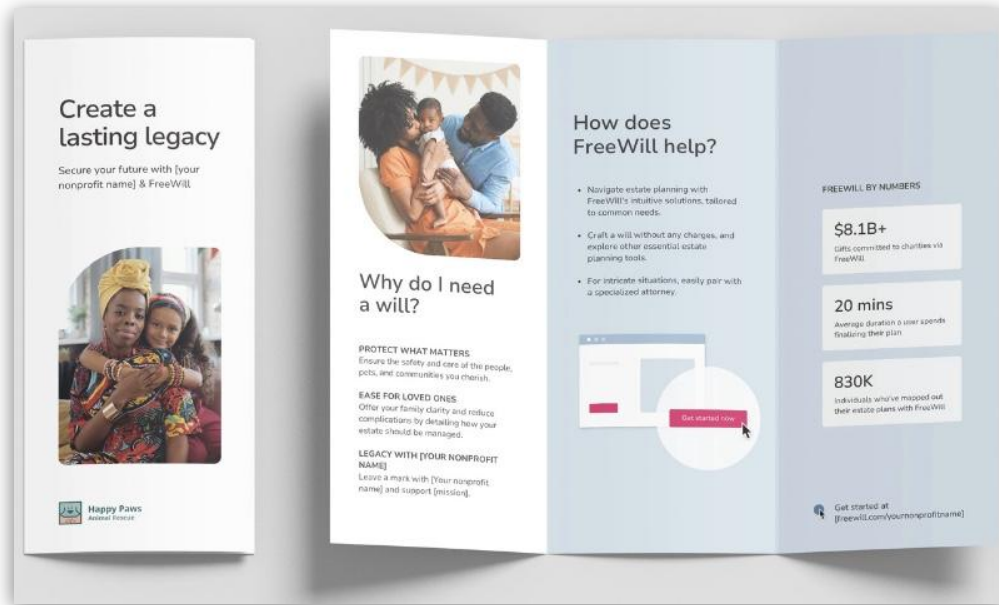
56% of donors think print marketing is the most trustworthy out of all channels

67% of people feel mail provides a more personal connection vs. the internet

Print pieces typically have a longer useful life than emails, and can reach those who:

- Don't have an email on file
- Have opted out of e-comms
- Don't read their email

FreeWill's [Marketing Library](#) contains beautifully designed templates that are fully customizable by you in Canva



Complement your digital outreach with a print campaign



Write your legally valid will, for free

Embark on a journey of securing your future and making a difference. Start today.


Contact us

For any queries, reach out to Amy Harrison at harrison@adelphi.edu or 516.877.3751


Adelphi University
One South Avenue
Garden City, NY 11530
Adelphi.edu

Follow us

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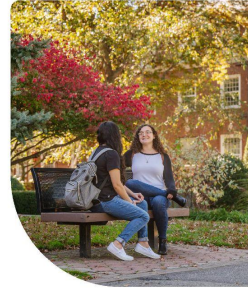
 @Adelphi University

 Get started at adelphi.edu/hr/benefits/freewill/

ADELPHI
UNIVERSITY

FreeWill

A complimentary estate planning tool for Adelphi alumni and employees



Why do I need a will?

PROTECT WHAT MATTERS

Ensure the safety and care of the people, pets, and communities you cherish.

EASE FOR LOVED ONES

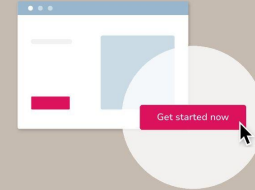
Offer your family clarity and reduce complications by detailing how your estate should be managed.

LEGACY WITH ADELPHI

Show your support and appreciation for Adelphi University's mission to change lives.

How does FreeWill help?

- Navigate estate planning with FreeWill's intuitive solutions, tailored to common needs.
- Craft a legally binding will without any charges, and explore other essential estate planning tools.
- For intricate situations, easily pair with a specialized attorney.



FREEWILL BY NUMBERS

\$8.1B+


Gifts committed to charities via FreeWill

20 mins

Average duration a user spends finalizing their plan

830K

Individuals who've mapped out their estate plans with FreeWill

 Get started at adelphi.edu/hr/benefits/freewill/



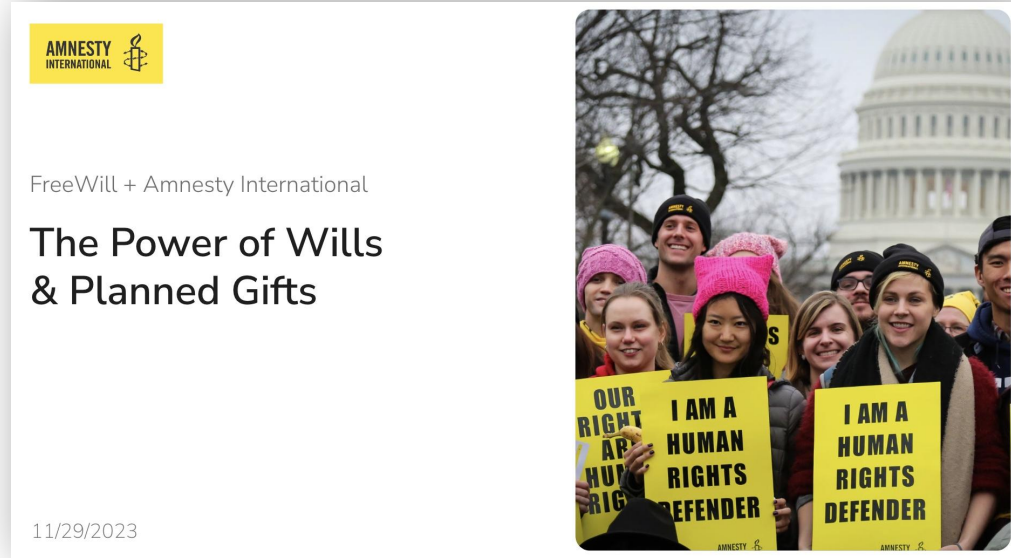
Lead a planned giving workshop or webinar for your audience

Our *FreeWill For You* presentation toolkits include fully-customizable slide decks and speaker notes for your event

This makes it easier than ever to lead a planned giving presentation of your own

Download a slide deck to get started:

- [Planned Giving Presentation Toolkit](#)
- [Creating a Legacy of Faith Toolkit](#)



AMNESTY INTERNATIONAL

FreeWill + Amnesty International

The Power of Wills & Planned Gifts

11/29/2023



Other ideas

Leverage planned giving during a down economy – these gifts cost nothing now but make a meaningful impact later

[Playbook: Fundraising during a recession](#)

Consider a thank you gift appeal, similar to Yellowstone Forever's Valentine's Day postcard

[Planned giving's magic words: thank you](#)

Consider a legacy challenge campaign, utilizing a matching pool of unrestricted cash to entice planned giving donors to document new planned gifts (the planned giving donors get to direct the matching funds)

[Slides](#) / [Recording](#) "Implementing a legacy challenge campaign"



04 Planned gift mentions in existing outreach

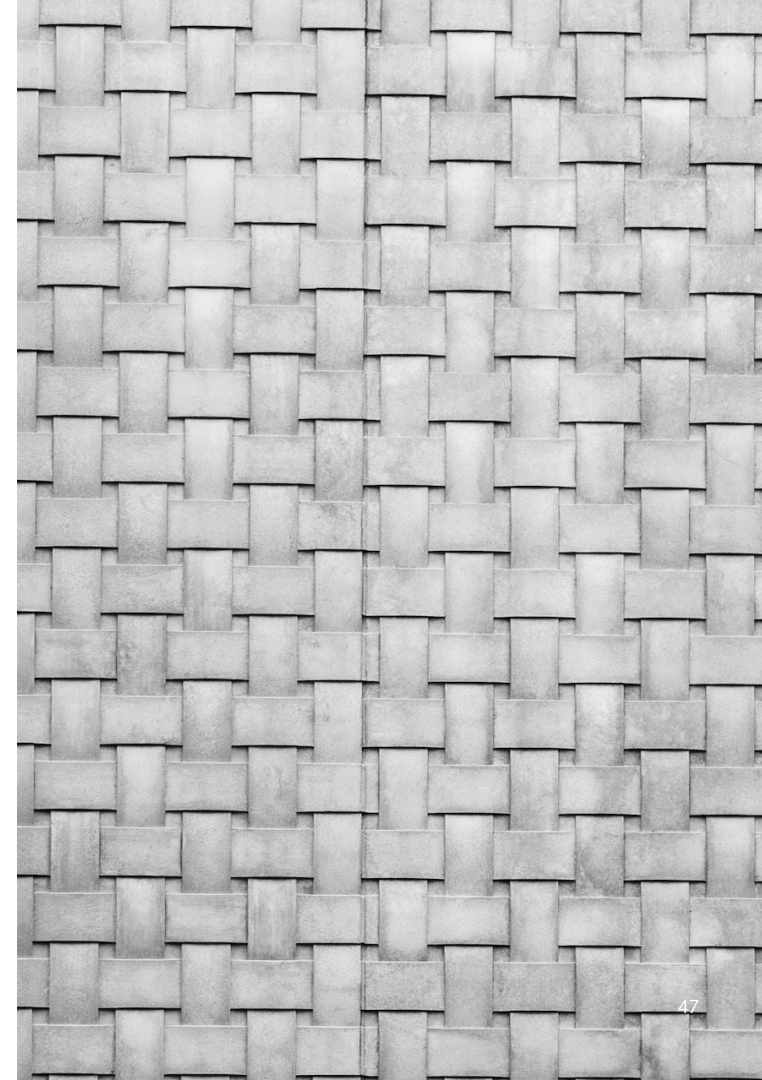


What is an “integrated mention”?

Mentions in outreach you’re already sending or on platforms that facilitate regular communication

The most common mediums for integrations are:

- Language in print & digital appeals (postscripts, call-out boxes)
- Links in gift confirmation emails
- Buckslip inserts in mailed appeals or gift acknowledgements
- Blurbs in e-newsletters
- Social media posts
- Links in email signatures/footers
- Website pop-ups or banners
- Blog posts
- “Ads” in the org’s magazine or print newsletter



Why are integrations important?

Repetition is essential to drive action

Donors may not take the desired action the first time they hear your message

They may need several reminders

Integrations help ensure your message reaches the donor when they're ready to act, providing ongoing education and building comfort with the subject

They're easy and cost-effective

Messaging will depend on your goal for that integration (ongoing education? generating gifts? sharing a free resource with donors?)



Language for common integrations can be found in your Content Center in Portal

Ask your strategist for a tracking link for each integration you use

We'll happily draft language for other integrations for partners with a full service contract

Newsletter - New Chapter, New Legacy

Write the next chapter of [ORG]

As we begin a new year, you can help us write a new chapter with your legacy! Many [ORG] supporters create a gift in their will or trust to support the future of [MISSION] and write a chapter of generosity into their life's story. We partner with FreeWill to make the process of creating a will and designating a legacy gift as simple as possible. Join this legacy in 2024!

<hyperlink Tracking Link>[Create my legacy](#)<hyperlink Tracking Link>

Postscript

P.S. Kick off the new year with a <hyperlink Tracking Link>[free estate plan](#) <hyperlink Tracking Link> to support your future, and the future of [ORG].

Email Signature

<hyperlink Tracking Link>[New year, new plan! Create a free will to get peace of mind for 2024.](#)<hyperlink Tracking Link>



Test a planned giving donor testimonial

Testimonials are a nice stewardship touch for legacy donors, and may inspire others to follow their example

Spotlight living legacy donors across the wealth and giving spectrum

Try sharing written or video testimonials in:

- emails / e-newsletters
- social posts or blog posts
- print magazines / newsletters
- annual reports



05

Putting it all together in a campaign



Campaign Components

ASAP: Review planned giving web content & placement – make improvements, as needed

First half / Second half of the month:

- *Two-part email series to a broad audience (messaging based on your goal)*

Any time during the month:

- *Email encouraging your nonprofit's internal staff to use FreeWill to write their plan*

Throughout the month:

- *Blurbs in e-newsletters*
- *Social media posts*
- *Postscripts in print & digital appeals*
- *Links in email signatures*



Campaign Components

Early in the month:

- *Optional print campaign (postcard, tri-fold brochure, etc.) to select prospects, esp. those who don't have an email on file*

Throughout the month:

- *Introducing planned giving in conversation with donors in qualification / under management*

Any time during the month:

- *Optional donor-facing workshop / webinar about the importance of estate planning and planned gifts*



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Resources & next steps



TO EXPLORE:
Resources

- [FreeWill's Marketing Library](#)
- [William – your AI-powered writing assistant](#)
- [FreeWill For You: Planned Giving Presentation Toolkit](#)
- Demo version of a [Planned Giving Microsite](#)
- [2023 Bequest Campaign Retrospective](#) (52-min. video)



LOOKING AHEAD:

Next steps

1. Complete the [post-training survey](#)
2. Share key learnings and samples with your team and apply what you've learned in the coming year



Thank you!

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Nonprofit Training Lead

E. training@freewill.com

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