

FREEWILL PARTNER TRAINING

# Planned Giving Solutions (104)



# 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 How FreeWill's planned giving solutions help donors and your nonprofit
- 02 Talking points: Why should your donors use the FreeWill products?
- 03 Live demos of the planned giving tools
- 04 Resources & next steps



01

How our planned giving solutions help donors and your nonprofit



## PLANNED GIFTS

**Gifts established now**  
but not realized until a  
future date

Gifts in wills and revocable living trusts

Bequests made outside the FreeWill platform

Beneficiary designations on non-probate assets



## Meaningful ways to give

The typical planned gift is **200x-300x** 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**

Donors who make bequest commitments increase their annual giving by an average of **75%**



## Meaningful ways to give

Planned gifts are often the **largest** contribution of a donor's lifetime

They're a **profound statement of support** that places your nonprofit alongside the donor's loved ones in their final wishes

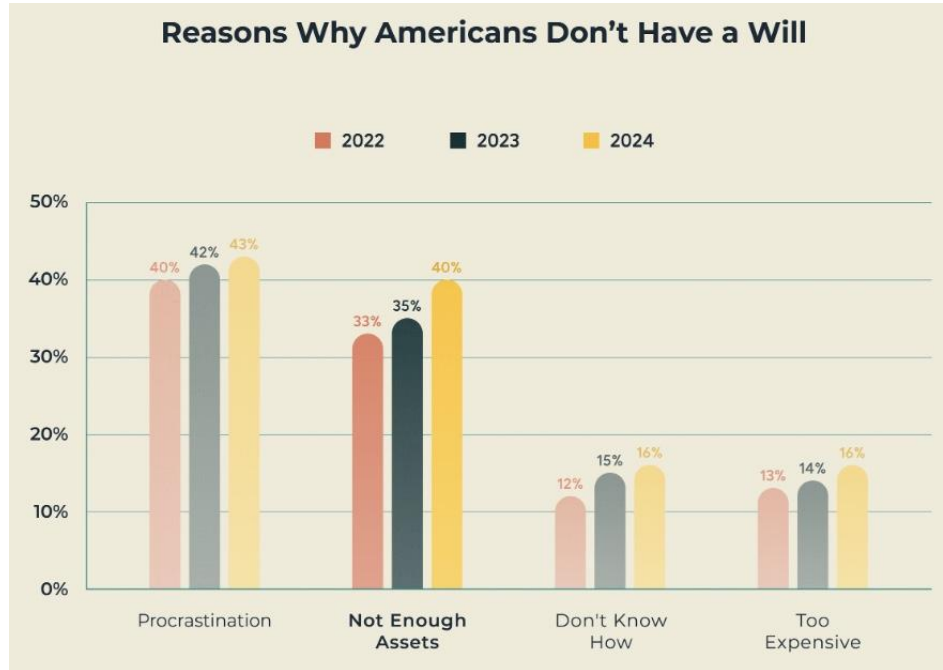
They **create a legacy** with the donor's favorite causes (how do they want to be remembered?)



# Planned gifts can be challenging

64% of Americans think having a will is important

Less than 32% of Americans have an estate plan



Source: [Caring.com's 2023 Estate Planning & Wills Survey](#)



# Planned gifts can be challenging

What are the challenges?

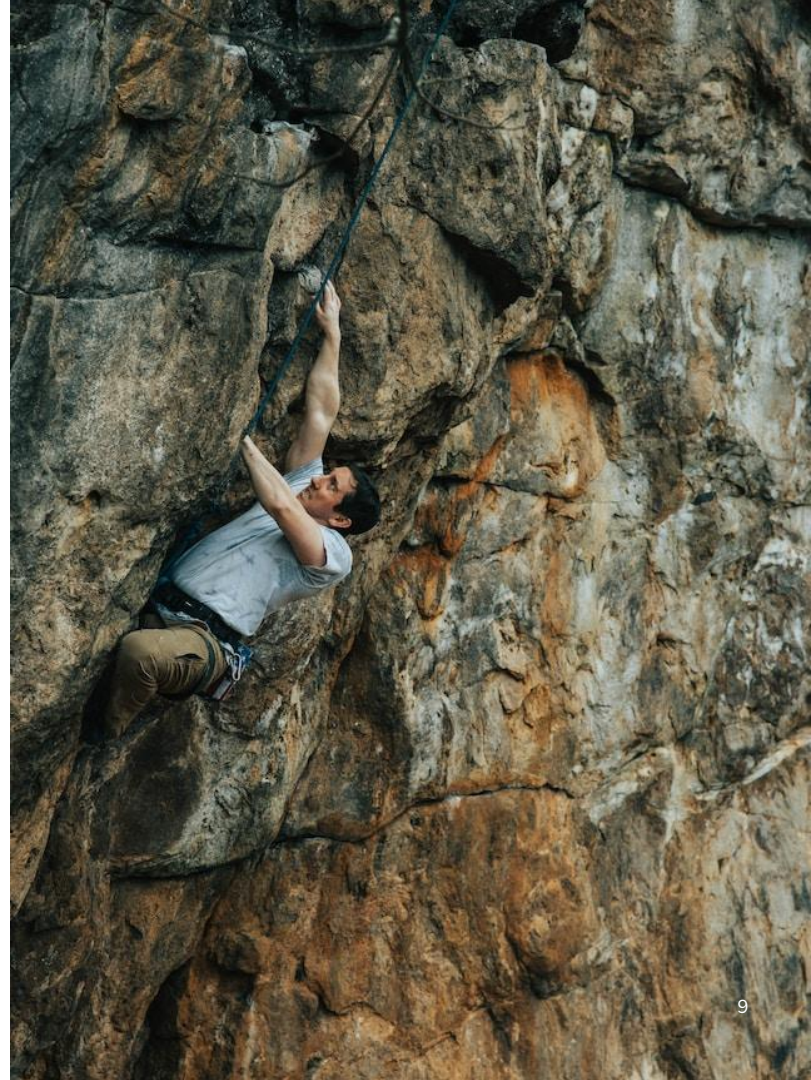
No matter how you package it, estate planning is planning for one's own death

Humans have a natural aversion to thinking about mortality

Typical avoidance responses:

- **Distract:** I'm too busy to think about that right now
- **Differentiate:** It doesn't apply to me now because (I'm healthy, I exercise, I don't smoke, etc.)
- **Deny:** Those worries are overstated
- **Delay:** I'll definitely think about this...later
- **Depart:** I'm going to stay away from that reminder

There's no inherent urgency to complete this task



# Planned gifts can be challenging

What are the challenges?

Donors over-complicate the process in their own minds

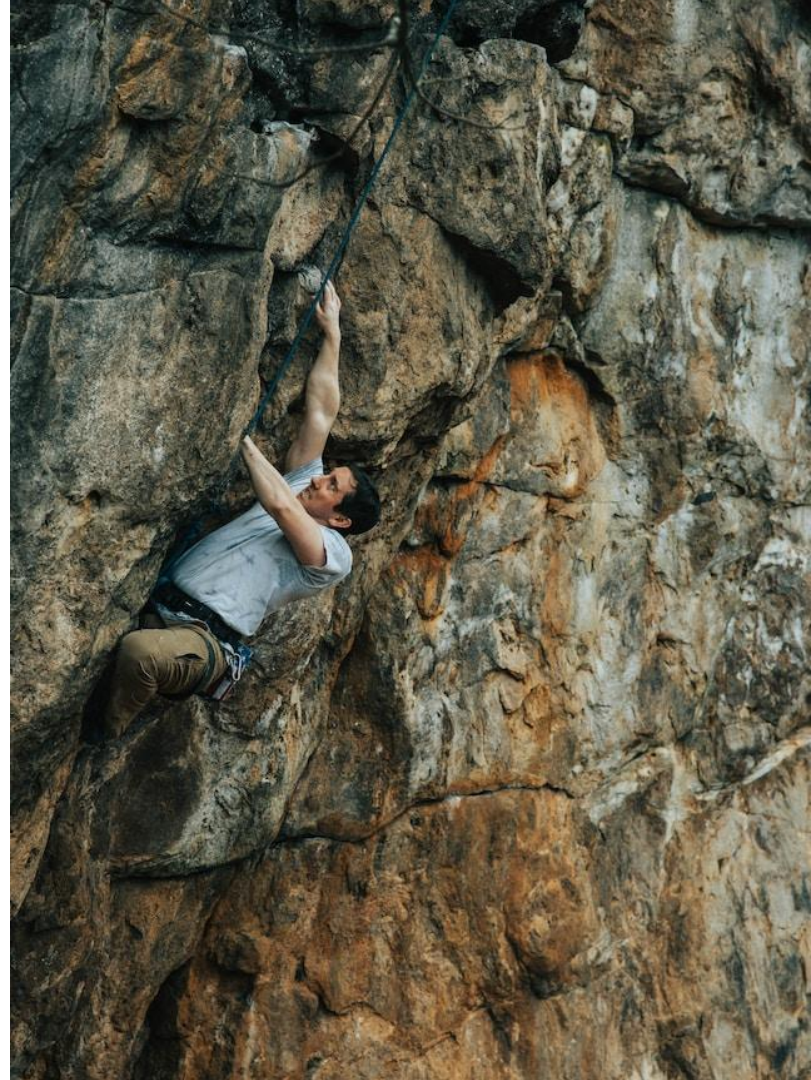
They fear working with an attorney will be too expensive

Donors are often unfamiliar with gift options – and so are gift officers!

Even for those who are open to a planned gift, there can be a long consideration timeline

Those who do establish a gift intention may never tell you

- Privacy (“it’s my business”)
- Might change their mind
- Don’t want to be “pestered” by the nonprofit
- Don’t want special treatment
- Worried about the nonprofit sharing/selling their info



# FreeWill creates solutions

How do FreeWill's products solve for these challenges?

- An intuitive user experience leads the donor through the process step-by-step
- Free, quick, and easy to use from the comfort of home
- Offers option to remain anonymous, but includes education on why named gifts are helpful
- Customized landing page designs and user flows feel like a natural extension of your website
- Marketing and content support for compelling educational outreach campaigns *(with a full-service contract)*
- Prompt reporting of drafted & completed gift commitments
- Data on the effectiveness of your FreeWill outreach



# Intuitive user experience

LAST WILL & TESTAMENT

BASICS    NOMINEES    ASSETS    RESIDUARY    GIFTS    FUNERAL    PROVISIONS    REVIEW

## Review your responses

Please review everything on this page to make sure it is in accordance with your wishes. If you would like to change anything, click the "Edit" button on the corresponding section.

### Basic Information

WILLMAKER NAME	LaurenTEST Winther-HansenTEST
WILLMAKER GENDER	Female
SPOUSE NAME	David Winther-Hansen
MARITAL STATUS	Married
ADDRESS	123 Test St Washington, DC 20002
APPROX. VALUE OF ASSET TRANSFER	\$1M - \$2M

[Edit](#)



# Intuitive user experience

LAST WILL & TESTAMENT

BASICS    NOMINEES    ASSETS    RESIDUARY    GIFTS    FUNERAL    PROVISIONS    REVIEW

### Executors of your Will

Nominating an executor\*

Full name (in order of preference)      Relationship

Test Person	Sibling	▼	Delete
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Click to add another

## Help: Nominating an executor

The executor does not need to be a lawyer or other legal or financial expert, but should be able to fulfill the following duties (note: they can hire professional help if needed):

- Locating your assets
- Deciding if your Last Will and Testament needs to be probated (depending on the size of your estate and local state laws) and if so, filing it with the probate court
- Contacting the people and organizations named as beneficiaries in your Will
- Ensuring the proper distribution of your property
- Setting up a bank account for the estate
- Paying any debts and expenses of the estate, including taxes, funeral expenses, and any other outstanding debts

It's also a good idea when nominating an executor to select a person who is:

- Not a witness to your will
- A legal adult at the time the will is executed
- In your state, since some courts only appoint individuals who reside in your state. If you decide to appoint an out-of-state executor, please consult a lawyer or county clerk to make sure your choice will be respected



# Free, quick, and easy to use



## 1. Fill out online

It only takes 20 minutes to fill out the information needed to create your last will and testament.



## 2. Print out forms

The information you provide is combined with the precise language of our legal forms, and provided back to you as a printable will.



## 3. Sign & keep safe

To make your will official, print and sign the will according to the attached instructions. Keep your new will somewhere safe but accessible.

## Prefer to see an attorney?

[Download a point summary of your will](#) to review with an attorney. This can save you both time and money!

## Resources

- [Reasons you might want an attorney](#)
- [American Bar Association Attorney Finder](#)
- [ACTEC Fellow Search](#)
- [Avvo](#)
- [Our FreeWill Fellows](#)



# Option to remain anonymous

## Supporting nonprofits

Will you make the work of nonprofits easier by letting them know who you are? 

Anonymous gifts may be less helpful to nonprofits because they often cannot be included in planned giving goals.

Help: Will you make the work of nonprofits easier by letting them know who you are? 

Your privacy is extremely important to us. We may share anonymized details about your charitable wishes with the nominated charities and their affiliates. However, opting-in to share your name, email, phone number, home address, birth date, and donation amount also allows these organizations to thank you and have a confidential and non-binding record of your generosity.

Unless you've nominated a specific designation during this process, your gift will, by default, go to the area of most need. If there is an area of impact most meaningful to you, your chosen charity would want to ensure your wishes are fulfilled to most endure your legacy.

Remember, you can always change your mind about the gift. Feel free to also regulate with the charity regarding the level of contact and engagement that you'd like to have with them. If you left a message alongside your bequest, this message will always show to the nonprofit you are donating to.



# Custom landing pages & user flows

freewill.com/peta

FREEWILL PETA

## A gift for you and your future

As a thank you for being a friend of PETA, FreeWill is delighted to help you create your legal will. It's 100% free to you, and most people finish in 20 minutes or less. [We also offer you the ability to create a free revocable living trust.](#)

Start my free will

FREEWILL For individuals For nonprofits For lawyers About us LaurenTEST

By including PETA in your will or trust, you can give animals the chance to experience life as it was intended: free from cruelty, exploitation, and neglect. You can create or update your legacy here for free. We appreciate your support.

## Get peace of mind

Just 20 minutes to create or update your legally-binding will

Get started now

Already included us in your will? Let us know by filling out [this form](#).

©iStock.com/Global\_Pics

Forbes AARP The New York Times GOOD HOUSEKEEPING marieclaire yahoo! Finance





# Custom landing pages & user flows


LAST WILL & TESTAMENT

BASICS   NOMINEES   ASSETS   RESIDUARY   GIFTS   FUNERAL   PROVISIONS   REVIEW

## Leave a gift to PETA

FreeWill is free to you because of the support of organizations such as PETA that work on meaningful issues. Will you consider leaving a gift in support of a cause that is important to you? Click 'No thanks' if you don't want to leave any gifts to charity at this time.

For a dog chained in a backyard or a monkey in a laboratory, PETA is often the only hope for relief. Since we were founded over four decades ago, supporters like you have helped us change the world for the better for animals. However, our work is nowhere near being done. Until no monkey, mouse, or rabbit suffers at the hands of experimenters; no hen is confined to a filthy shed; no terrified sheep is stomped on and cut during shearing; no bear paces in a dismal concrete pit at a roadside zoo; no dog languishes on a restrictive chain in all kinds of weather; and no animal suffers and is slaughtered for the most trivial of human interests, we'll vigorously pursue our groundbreaking work. By naming PETA in your legacy plans, you can help bring about more [landmark changes](#) for animals.



PETA 1 Choose another nonprofit

PETA

People for the Ethical Treatment of Animals (PETA) is dedicated to establishing and protecting the rights of all animals. PETA operates under the simple principle that animals are not ours to experiment on, eat, wear, use for entertainment, or abuse in any other way.

As the largest animal rights organization in the world (with more than 6.5 million members and supporters worldwide), PETA has made groundbreaking advances for animals who are abused by corporations, governments, and individuals around the globe. PETA works through public information, cruelty investigations, research, animal rescues, litigation, special events, celebrity involvement, and protest campaigns.

Whether by working with universities and government institutions to implement non-animal test methods, sparking a boom in cruelty-free product marketing and a nosedive for the global fur industry, or rescuing tigers, bears, and other animals from dismal roadside zoos, PETA has been the driving force in ending many cruel practices and policies that harm animals. Millions of animals have benefited from its campaigns, as noted at [PETA.org/Milestones](#).

For a dog on a chain in a backyard or a monkey in a laboratory, PETA is often the only hope for relief. Your support of its vital work can help bring about more landmark changes for animals. For more information, visit [PETA.org](#).

Close



# Marketing & content support

with a full-service contract



## New Year's Resolution Email

Example: "Turn a Page" framing

It's a new year! Below, find an email encouraging your supporters to start 2024 on the right foot by creating their estate plan.

This is an example only. In order to receive your email(s) and Tracking Link(s), please request a customized version from your Strategist.

### Email

**Subject:** Turn the page on 2024, [NAME]

**Preview text:** We're opening a new chapter - write your first page today!

**Body:**

Dear [NAME],

**Happy New Year!** As we usher in 2024, it's a time of reflection, anticipation, and setting intentions for the year ahead. Much like a cherished book, [PARTNER]'s story is composed of various chapters, and we're starting a new chapter of compassion and impact.

With the blank pages of 2024 in front of us, one of the smartest ways you can start this new year strong is with an up-to-date estate plan. Turning the page to a new year is the perfect moment to solidify your plan.

With our trusted partner **FreeWill's online estate planning tool**, you can easily and comprehensively plan for the people, causes, and treasures closest to your heart.

[Write My Will](#)

As you draft your personal legacy, I invite you to consider including a planned gift to [PARTNER]. By doing so, you ensure your personal narrative lives and play an integral role in advancing our mission for years to come.

Whether it's your family, friends, or a cause you are deeply passionate about, let this year be the one where you **turn the page and pave the way for future chapters to unfold gracefully.**

Thank you for considering this important step, and for your continued dedication to [PARTNER] and our mission.

Warmly,  
[SIGNATURE]

## New year, new chapter, new legacy

Write your next chapter and your legacy  
with a free estate planning tool



FREEWILL 



# Prompt reporting

FREEWILL

Good morning,

Great news! Columbia University has received new primary bequest(s).



We also have a [resource on donor stewardship](#) to help you make your relationship with your donors as impactful as possible! **Hot tip: our most successful partners call their donors directly as soon as possible after the gift is committed to give a personal thank you!**

If you have any questions or would like to opt out of notifications, please [Reply](#) to contact your Strategist.

If there are problems with how this message is displayed, you can view [gift details in the Partner Portal here](#).

## Legacy Commitments

Legacy Gifts | Funeral Wishes ⓘ | Removed Gifts

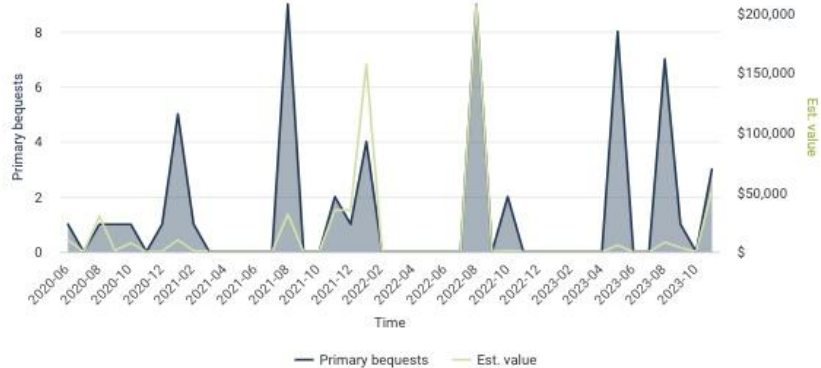
FILTERS ⓘ

STATUS	ASSET TYPE	VALUE	DESIGNATION	DONOR	LOCATION	DATE CREATE ↓	DATE CHANGED ⓘ
Requested ...	Will <span>Draft</span> Primary	\$75,000 (Est.) Percentage	Acme Corporation Area of Greatest Need	Michelle Shefter	Silver Spring, MD	Nov 20, 2023	-
Identified	RLT Primary	\$5,000 (Est.) Percentage	Acme Corporation ACME Subprogram 2	Timothy McClendon pref: Timothy	Morrow, OH	Nov 7, 2023	-
Received	Will Tertiary	\$315,000 (Est.) Percentage	Acme Corporation Area of Greatest Need	Valerie D'Aquila pref: Val	Hudson, MA	Oct 26, 2023	-
Confirmed	Will Primary	\$35,000 (Est.) Percentage	Acme Corporation Area of Greatest Need	Valerie D'Aquila pref: Val	Hudson, MA	Oct 26, 2023	-
Confirmed	Outside bequest	\$10,000 (Est.) Percentage	Acme Corporation Area of Greatest Need	Sarah Test Liebman	Black Mountain, NC	Oct 23, 2023	-
Requested ...	Outside bequest	\$140,000 (Est.) Percentage	Acme Corporation Area of Greatest Need	api test cranmer		Sep 27, 2023	-
Received	Will Secondary	\$315,000 (Est.) Percentage	Acme Corporation Area of Greatest Need	Jason Married	Silver Spring, MD	Sep 14, 2023	Sep 14, 2023
Confirmed	Will Primary	\$35,000 (Est.) Percentage	Acme Corporation Area of Greatest Need	Jason Married	Silver Spring, MD	Sep 14, 2023	Sep 14, 2023
Received	Will Primary	\$35,000 (Est.) Percentage	Acme Corporation Area of Greatest Need	Michelle Married	Silver Spring, MD	Sep 14, 2023	-
Confirmed	Will Secondary	\$315,000 (Est.) Percentage	Acme Corporation Area of Greatest Need	Michelle Married	Silver Spring, MD	Sep 14, 2023	-
Identified	Will <span>Draft</span> Primary	\$10,000 (Est.) Percentage	Acme Corporation Area of Greatest Need	Anonymous	Evanston, IL	Sep 14, 2023	-
Confirmed	Will Primary	\$10,000 (Est.) Percentage	Acme Corporation Area of Greatest Need	Carlton Thomas	Evanston, CA	Aug 18, 2023	Sep 14, 2023
Identified	Outside bequest	\$10,000 (Est.) Percentage	Acme Corporation Area of Greatest Need	Carlton Thomas	Evanston, CA	Aug 16, 2023	-
Confirmed	Retirement account Primary	\$100,000 (Est.) Percentage	Acme Corporation ACME Subprogram 2	Lisa Maxwell-Frieden	Fort Wayne, IN	Aug 4, 2023	-



# Data & analytics

### Primary bequests over time



### Campaign performance summary (beta)

	UTM campaign	UTM medium	Entry path	Traffic	Total estate plans	Estate plans completed	Count Primary	Total Est Amount Primary
1			/columbia...	992	23	7	2	\$82,500
2		followup	/columbia...	513	65	42	5	\$76,500
3	202108_co...	eblast	/columbia...	402	63	39	4	\$22,000
4	202101_co...	enewsletter	/columbia...	287	42	28	5	\$10,500
5	resolutionc...	eblast	/columbia...	251	20	9	4	\$2,000
6	202305_co...	enewsletter	/columbia...	230	31	22	3	\$3,000
7	202108_co...	followup	/columbia...	214	51	29	7	\$44,650

▼ Traffic data is updated nightly. Date filters do not apply to this table.



02

Talking points: Why should your donors use the FreeWill products?



# Why should donors use your FreeWill planned giving products?

These online tools:

- Can be found easily on your nonprofit's website and/or planned giving microsite when they're ready to begin
- Quick and easy to use – 20 to 30 minutes from the comfort of home
- Free to use – absolutely no cost to the user
- Simplifies the estate planning process, leading them step-by-step with native “help” features throughout
- Can be paired with an attorney, if desired, to document the user's wishes first
- Alert you (the nonprofit) that a gift intention was created, so you can thank them for their generosity and ask their preferences for recognition



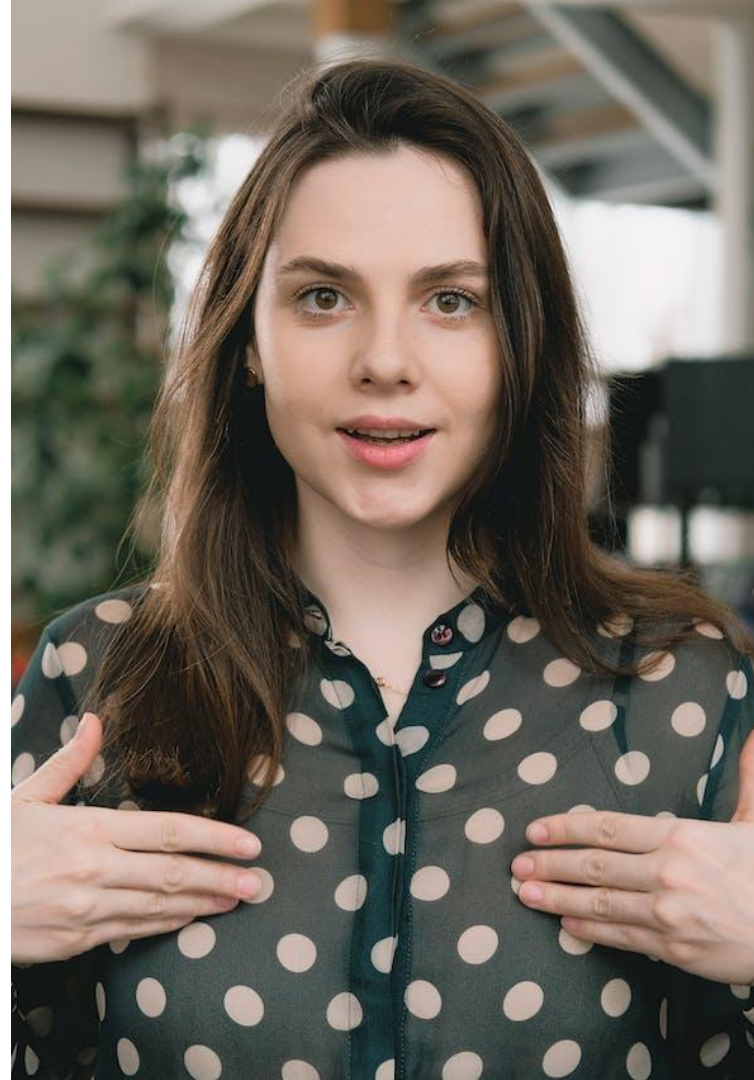
## Talking points

*...Increasingly, [Org Name] supporters are choosing to include gifts to the organization in their wills and trusts. Many are surprised to learn how easy it can be to establish a planned gift that will one day make a profound impact on our mission.*

*I pass this along in case it's helpful for any of your charitable giving, so you can create a meaningful legacy with any of the causes you support.*

*If you do not yet have a will or trust in place, please consider using our [easy online tool](#) to get started. Through our partnership with FreeWill, you can create your plan in under 30 minutes and at no cost, all from the comfort of home.*

*If you prefer to work with an attorney to establish your plan, you might choose to document your wishes using [FreeWill](#) first, to save time and money.*



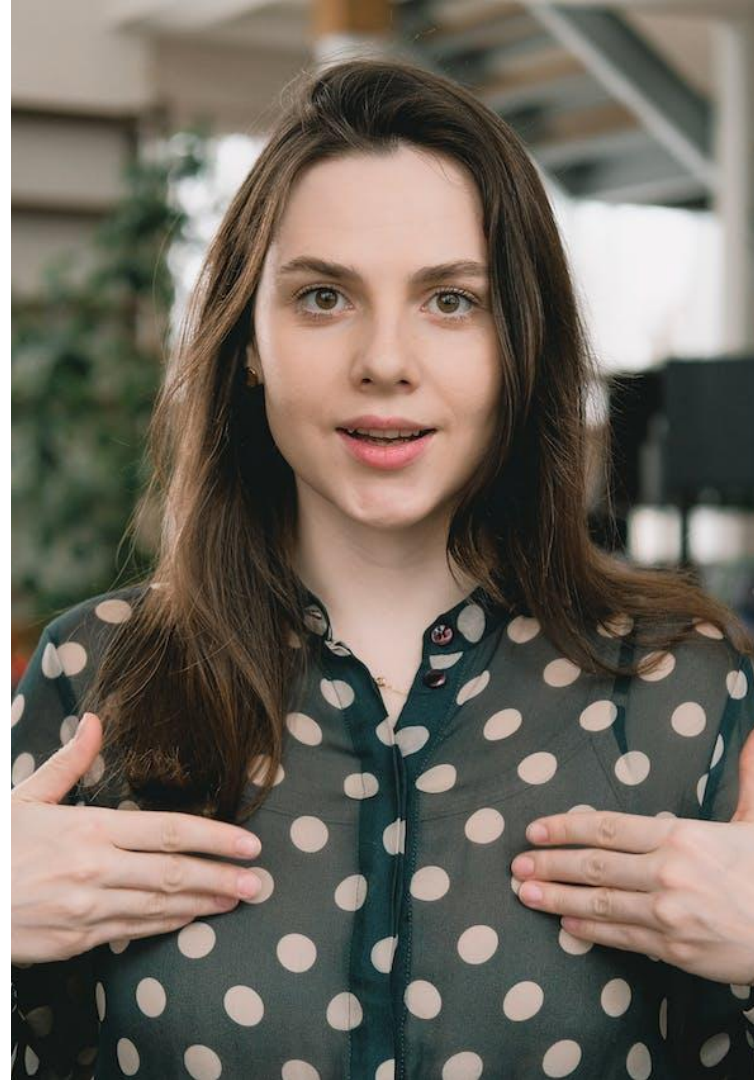
## Talking points

*Keep in mind you're free to log back into FreeWill to change or update your will and legacy gifts at any time.*

*And while you're welcome to remain publicly anonymous, we do hope you'll share your gift intention with us so we can thank you for your generosity.*

*If you use the tool to get started, please let me know your thoughts on its ease of use!*

*We're proud to offer this tool to our donors and believe it makes estate planning more accessible to all.*





# Docs that FreeWill supports

## Last will & testament

Your custom landing page or  
<https://www.freewill.com>

## Revocable living trust

Your custom landing page (all 50 states & DC) or  
<https://www.freewill.com> (CA only)

## Beneficiary designations

Built into the will flow, or share your custom landing page or  
<https://www.freewill.com/beneficiaries>

## Durable financial POA

All 50 states & DC  
<https://www.freewill.com/durable-financial-power-of-attorney>

## Advance health care directive (AHCD)

<https://www.freewill.com/advance-healthcare-directive>

## Gift intent form

For custom bequest tool partners only:  
<https://www.freewill.com/record/XXX>

## Digital assets

Built into the will flow on all sites

## Funeral instructions

Built into the will flow on all sites

## Pet trust

Pet care is built into the will flow on all sites

Pet Trusts are built into the RLT flow



# 03

## Exploring the planned giving tools



# Last Will & Testament with FreeWill

Test custom site: <https://www.freewill.com/happypaws>

Public site: <https://www.freewill.com/>



# Revocable Living Trust with FreeWill

Test custom site: <https://www.freewill.com/trust/happypaws> (all 50 states & DC)

Public site: <https://www.freewill.com> (CA only)



# Beneficiary Designations with FreeWill

Test custom site: <https://www.freewill.com/beneficiaries/happypaws>

Public site: <https://www.freewill.com/beneficiaries>



# Gift Intent Forms with FreeWill

Test custom site: <https://www.freewill.com/record/happypaws>



# 04 Resources & next steps



## TO EXPLORE: Resources

- Recorded [product demos](#) and [feature updates](#)
- Recorded tour/demo of [Partner Portal](#)
- [Dr. Russell James](#)

*Inside the Mind of a Planned Giving Donor*  
([recording](#), [slide deck](#))

*Words that Work*  
([recording](#), [slide deck](#))





## LOOKING AHEAD:

# Next steps

1. Fill out our [post-training survey](#)
  2. Use the links in this slide deck to create test documents with a fake name/info to better understand the user experience
- Remember: Links to your org's planned giving landing pages are available on your Portal's home page



# Thank you!

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