

FREEWILL PARTNER TRAINING

# Smart Giving Marketing (102)



# Smart 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

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

Eligible for 5.0 CFRE continuing education credits



# Agenda

- 01 Why smart giving marketing is essential
- 02 Smart giving on the web
- 03 Standalone smart giving outreach at key times of year
- 04 Smart gift mentions in existing outreach
- 05 Putting it all together (EOY 2023)
- 06 Resources & next steps



01

Why smart gift marketing  
is essential



# What proactive outreach accomplishes

Outreach focused exclusively on smart gifts:

1. Drives traffic to your smart giving landing page or smart giving products
2. Encourages those already interested in creative gift options to give now
3. Captures the attention of people who are unfamiliar with these gift types
4. Provides ongoing donor education about creative ways to give
5. Helps donors feel comfortable initiating a smart gift to your organization

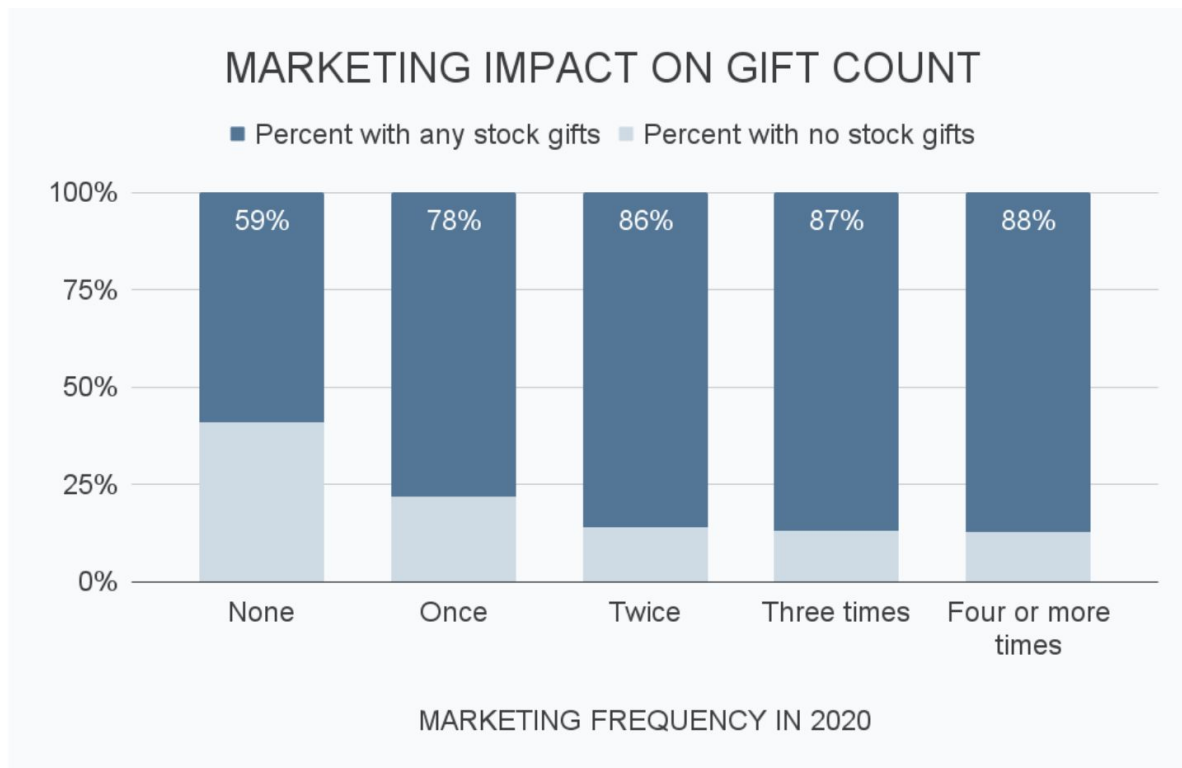


## What proactive outreach accomplishes

Orgs that sent educational info or appeals about stock donations at least twice in 2020 were **1.5x more likely** to get gifts than those that didn't promote them at all

The more you talk to your donors about stock giving, the more familiar, commonplace, and straightforward it becomes

Plus, your online giving tools make it easier to give

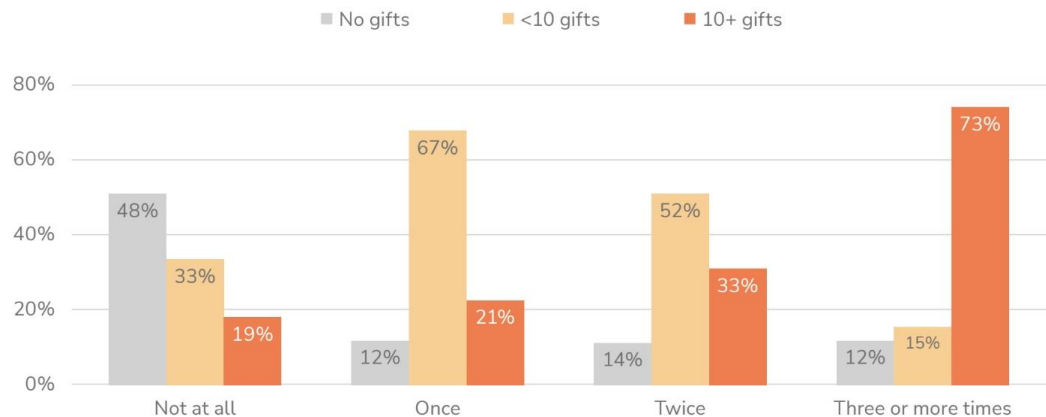


# What proactive outreach accomplishes

Nonprofits that marketed QCDs at least three times in 2021 were **3.2x more likely** to receive 10+ gifts

If they did any marketing outreach at all, they were **2x more likely** to receive even one QCD

PERCENT OF ORGS RECEIVING QCDs VS MARKETING FREQUENCY



# What proactive outreach accomplishes

54% of survey respondents said they currently don't solicit DAF grants from donors

Of orgs that didn't receive a DAF grant in 2022, 4 in 5 didn't promote DAFs to donors

Of orgs that did receive a DAF grant in 2022, those who promoted them received more than **2.2x more DAF dollars** than those that didn't

AVERAGE TOTAL DAF  
DOLLARS RECEIVED  
IN 2022, BY ORGANIZATION





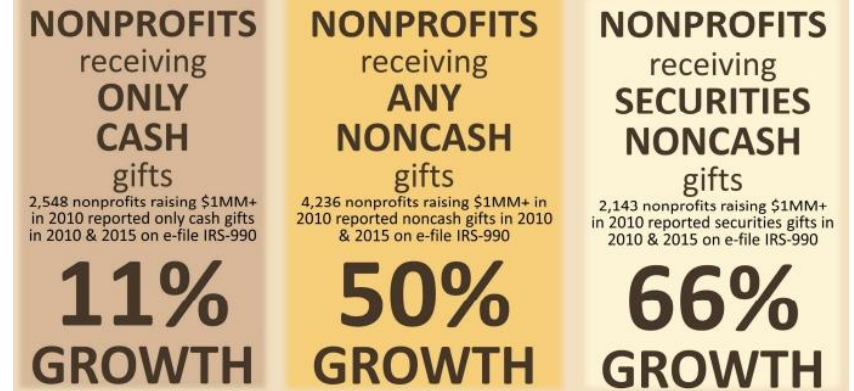
# What the data says: Smart gifts predict fundraising growth

Research shows that nonprofits that solicit & accept non-cash gifts grow their fundraising revenue at a rate of 5x to 6x those that don't

This applies to nonprofits at all levels

Regardless of an org's starting contributions level, those nonprofits consistently raising gifts of noncash assets – and particularly gifts of securities – grew total contributions much faster than did those raising only cash

## 5-year average growth in total fundraising (2010 to 2015)



## 5-year average total fundraising growth by initial total fundraising size

	\$100K to <\$500K	\$500K to <\$1MM	\$1MM to <\$2MM	\$2MM to <\$3MM	\$3MM to <\$5MM	\$5MM to <\$10MM	\$10MM+
<b>Nonprofits reporting only cash</b> contributions in 2010 & 2015 on e-IRS 990s	56% [n=9168]	25% [n=2397]	14% [n=1343]	18% [n=478]	0% [n=358]	0% [n=223]	26% [n=146]
<b>Nonprofits reporting any noncash</b> contributions in 2010 & 2015 on e-IRS 990s	137% [n=2278]	71% [n=1373]	60% [n=1215]	58% [n=652]	48% [n=728]	36% [n=679]	35% [n=962]
<b>Nonprofits reporting securities</b> noncash contributions in 2010 & 2015 on e-IRS 990s	400% [n=114]	176% [n=187]	103% [n=340]	94% [n=284]	68% [n=385]	50% [n=427]	43% [n=707]



# 02

## Integrating smart giving on your nonprofit's website



## Key guidelines

Adding info on smart giving – and your FreeWill Smart Giving products specifically – to your website is highly effective

Where to integrate?

- **Ways to Give page:** People visiting this page are already primed to explore new ways to make a difference
- **Vendor-administered microsite:** Work with FreeWill or other vendors to create & maintain smart giving webpages
- **Donate page:** Donors looking to give cash can make a greater impact by giving non-cash assets



# What the data says

## Web content is the #1 driver of smart gifts

On average, web content generates 2x as many stock gifts and 4x as many QCDs as other content

## Website content is responsible for ~90% of trackable partner stock + QCD gifts

Making your Donate and Ways to Give pages accessible from the top-line navigation or within a few clicks of your homepage increases traffic to those pages

Placement on the page matters – keep the links to your FreeWill products “above the fold” (no scrolling required)



# QCD web content

## Donate

Add a link, or maybe grab the attention of mature donors with a question:

- [Give from your IRA](#)
- [Are you age 70.5+?](#)

Navigate directly to your FreeWill QCD product, the QCD section of your Ways to Give page, or a dedicated QCD page

## Ways to Give

Opt for headers like **Give from your IRA** or **IRA Donations**, instead of Qualified Charitable Distributions

Encourage donors to initiate their gift through your FreeWill QCD product so you can properly credit them

- *To easily initiate a gift from your IRA, click the button below so we can be on the lookout for your gift and send you a receipt promptly.*

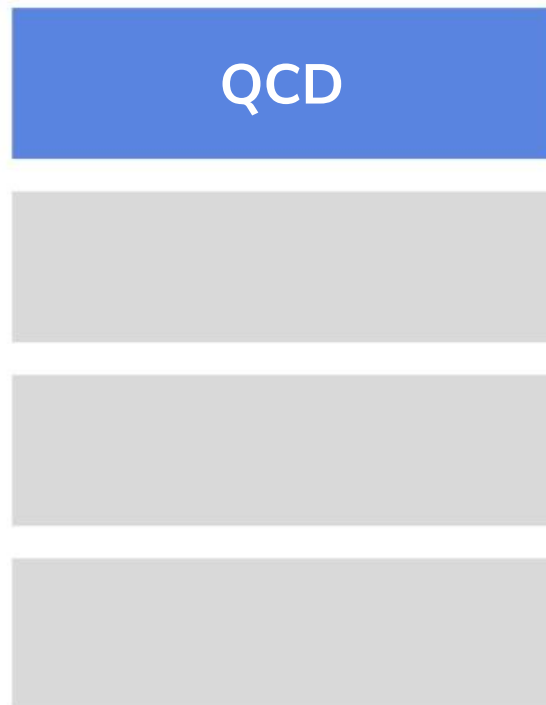


# QCD web content

## Dedicated QCD page

Use the page to provide more context around giving from one's IRA:

- How it works
- Who is eligible
- How QCDs help donors save on taxes, even if they don't itemize
- Link to the [Learn More page](#) of your QCD product
- QCD donor testimonial



# Stock web content

## Donate

Add a link that navigates directly to your FreeWill stock product, the stock section of your Ways to Give page, or a dedicated stock giving page

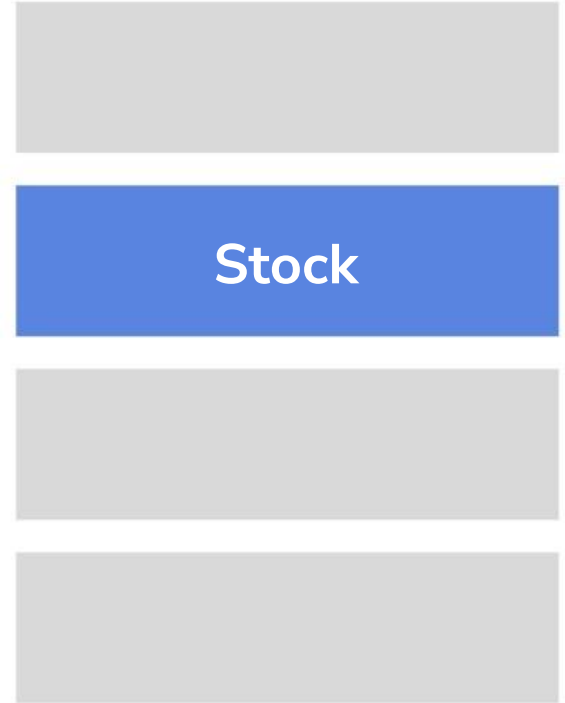
- [Stock Gifts](#)
- [Looking to donate stock shares?](#)

## Ways to Give

Opt for headers like **Stock Gifts** or **Donate Stock**, instead of Gifts of Appreciated Securities or Appreciated Assets

Encourage stock donors to initiate their gift through your FreeWill product so you can properly credit them

- *To give stock now, click the button below so we can track your gift and send you a receipt promptly, so you get the tax savings you deserve.*



# Stock web content

## Ways to Give

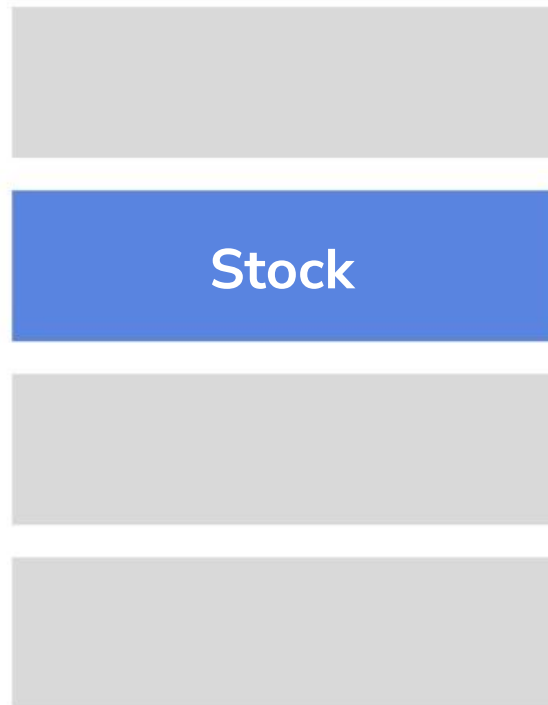
Remove DTC info & encourage donors to use the FreeWill product to access your brokerage information

- *If you would like to work through your own broker, access our transfer information [here](#).*

## Dedicated stock giving page

Provide more context around the benefits of giving stock instead of cash:

- How stock gifts work
- How stock gifts help donors save on two types of taxes at once
- Link to the [Learn More page](#) of your stock product
- Stock donor testimonial





# DAF web content

Note: Spell out “Donor-Advised Fund (DAF)” the first time you mention it

## Donate

Add a link that navigates directly to your FreeWill DAF product (preferred)

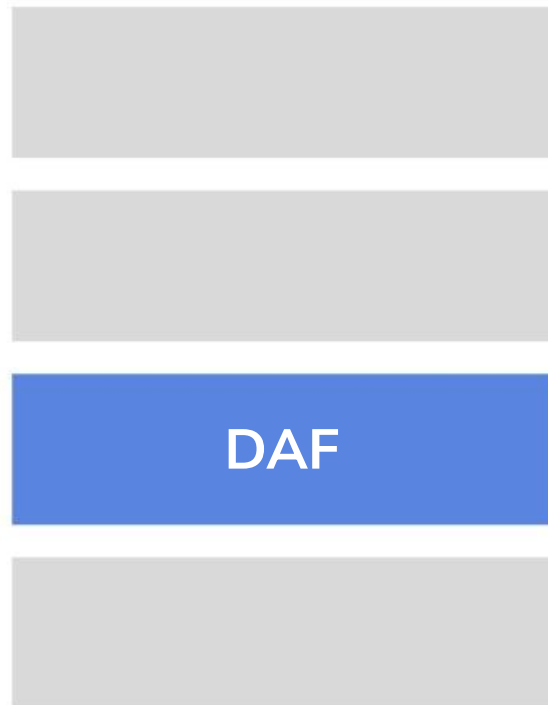
- [Give from your Donor-Advised Fund \(DAF\)](#)

Or link to the DAF section of your Ways to Give page or a dedicated DAF page

## Ways to Give

Explain what a DAF is and why some donors love them

Keep the language simple and jargon-free



# DAF web content

## Ways to Give

Encourage DAF donors to make their grant in just seconds using your FreeWill product

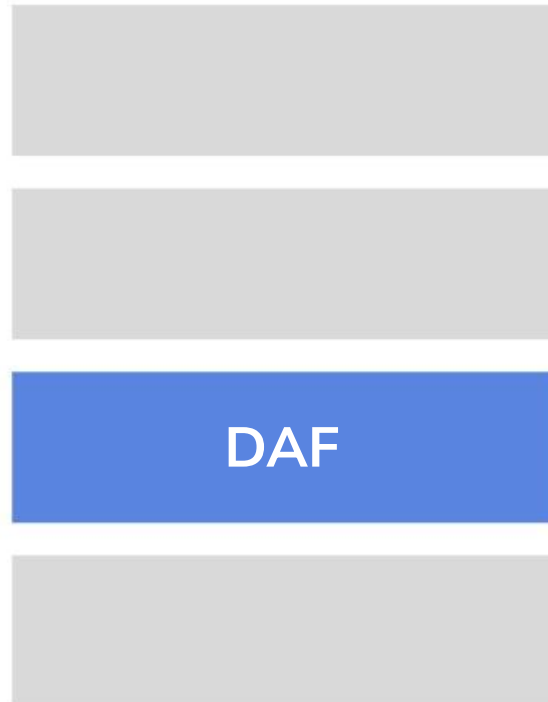
Make it clear that the DAF product integrates with donors' DAF providers, making it a simple end-to-end giving experience

- *To make your gift now, click the button below so we can properly credit and thank you when it arrives.*

## Dedicated DAF page

Provide more context around the benefits of DAFs:

- How they simplify the giving process for donors
- How they make more dollars available for charitable use
- DAF donor testimonial



# Crypto web content

Note: Spell out “Cryptocurrency” the first time you mention it

## Donate

Add a link that navigates directly to your FreeWill crypto product

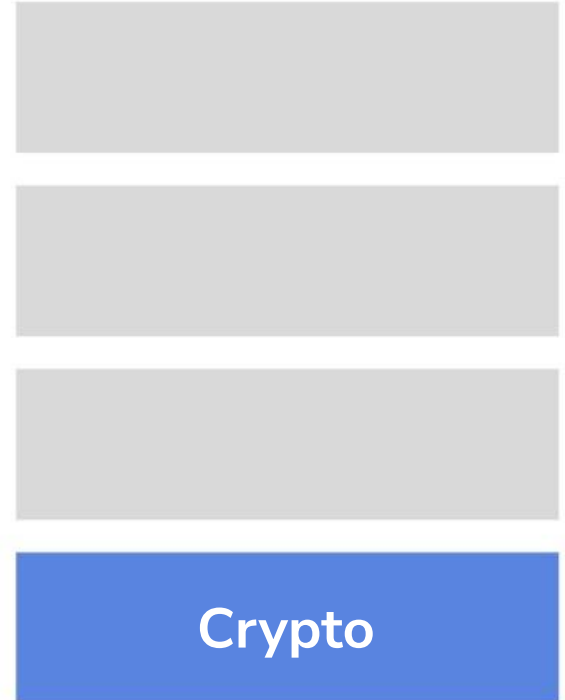
- [Give cryptocurrency](#)

## Ways to Give

Explain that crypto philanthropy is new and growing quickly

Highlight the tax benefits of donating crypto, including saving on capital gains

Crypto donors rarely want a long-term relationship with the nonprofit – appeal to their general altruism and spotlight tax minimization



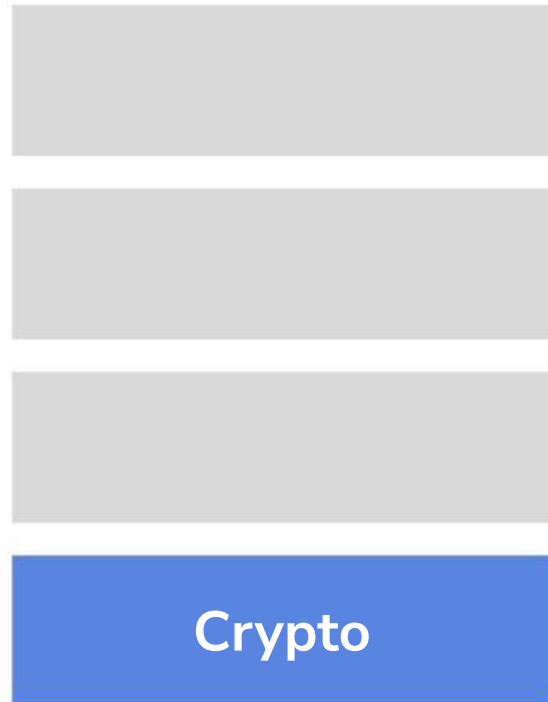
# Crypto web content

## Ways to Give

Encourage crypto donors to make their grant in just seconds using your FreeWill product

Make it clear that the crypto product is an end-to-end giving experience

- *To give crypto now, click the button below.*



# Sample: Ways to Give page

Effective choices:

- Clear, jargon-free headers
- Bold call-to-action buttons that direct to their FreeWill products
- Multiple creative gift options visible at once

Greater Pittsburgh community food bank

Search English >

About What We Do Ways to Give Get Involved FIND FOOD DONATE

## Donor Advised Funds

Donor-advised funds (DAFs) are a smart way to manage your philanthropy. DAFs are created by transferring a variety of assets to a commercial or community DAF provider, which may provide tax relief. Then, overtime, you can recommend grants to charities like the Food Bank at a cadence of your choosing. Click below to tell us about your DAF gift and navigate to your fund provider.

RECOMMEND A GRANT

## Give Through Your IRA

If you are at least 70½ years old, you can use a qualified charitable distribution (QCD) from your IRA to support your neighbors facing food insecurity. After reaching 73, a QCD may begin to count towards fulfilling your required minimum distribution.

LEARN MORE

## Give Stocks

By donating stocks, bonds or mutual funds, you may reap great tax advantages while making a big impact against hunger.

LEARN MORE

## Feed the Future

Help ensure that future generations grow up healthy – not hungry – by including Greater Pittsburgh Community Food Bank in your estate plans. Leave a powerful legacy that will fight hunger, now and for years to come.

LEARN MORE

## Tribute Giving

Honor a colleague, remember a loved one, or celebrate a special occasion with a tribute gift that helps feed local families.

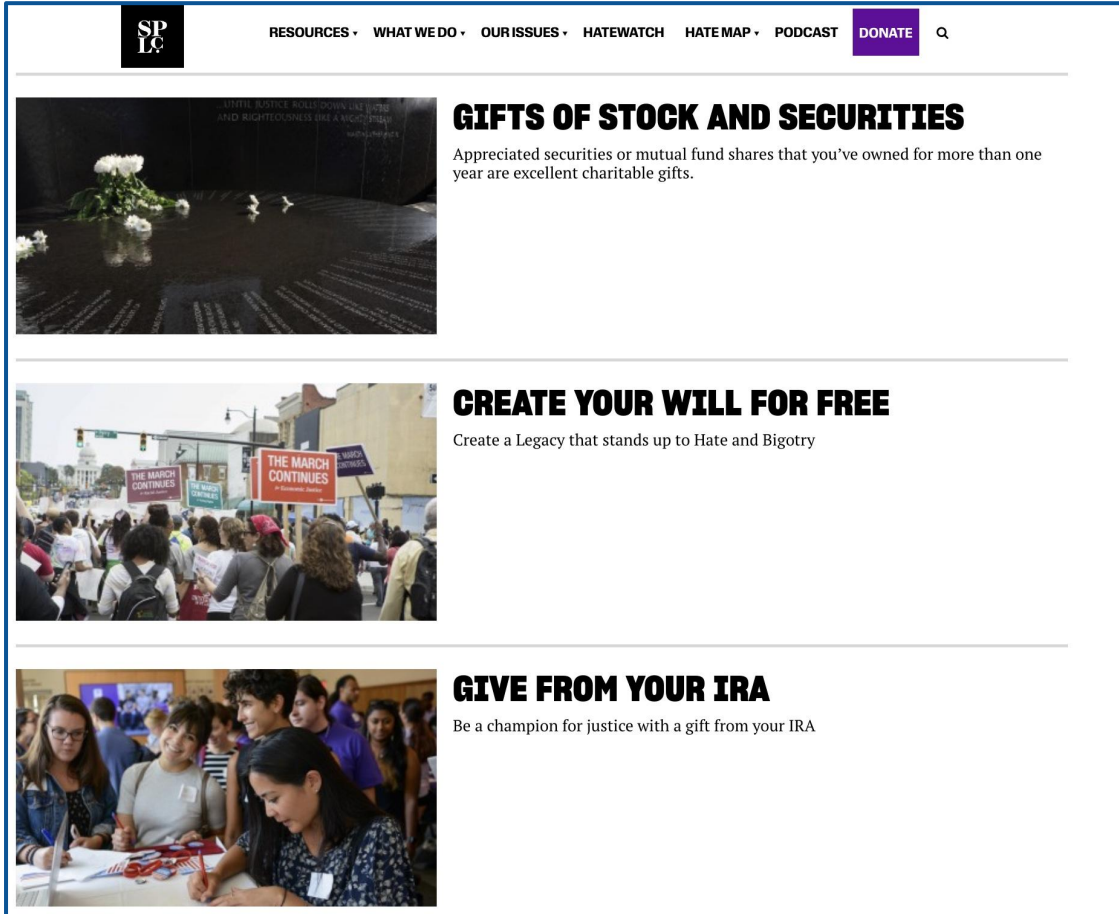
LEARN MORE



# Sample: Ways to Give page


Effective choices:

- Clear, jargon-free headers
- Effective use of mission-related imagery
- This page is linked on the main Donate page and in the top-line navigation



**SPIC** RESOURCES • WHAT WE DO • OUR ISSUES • HATEWATCH HATEMAP • PODCAST **DONATE** 🔍


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## **GIFTS OF STOCK AND SECURITIES**

Appreciated securities or mutual fund shares that you've owned for more than one year are excellent charitable gifts.


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## **CREATE YOUR WILL FOR FREE**

Create a Legacy that stands up to Hate and Bigotry

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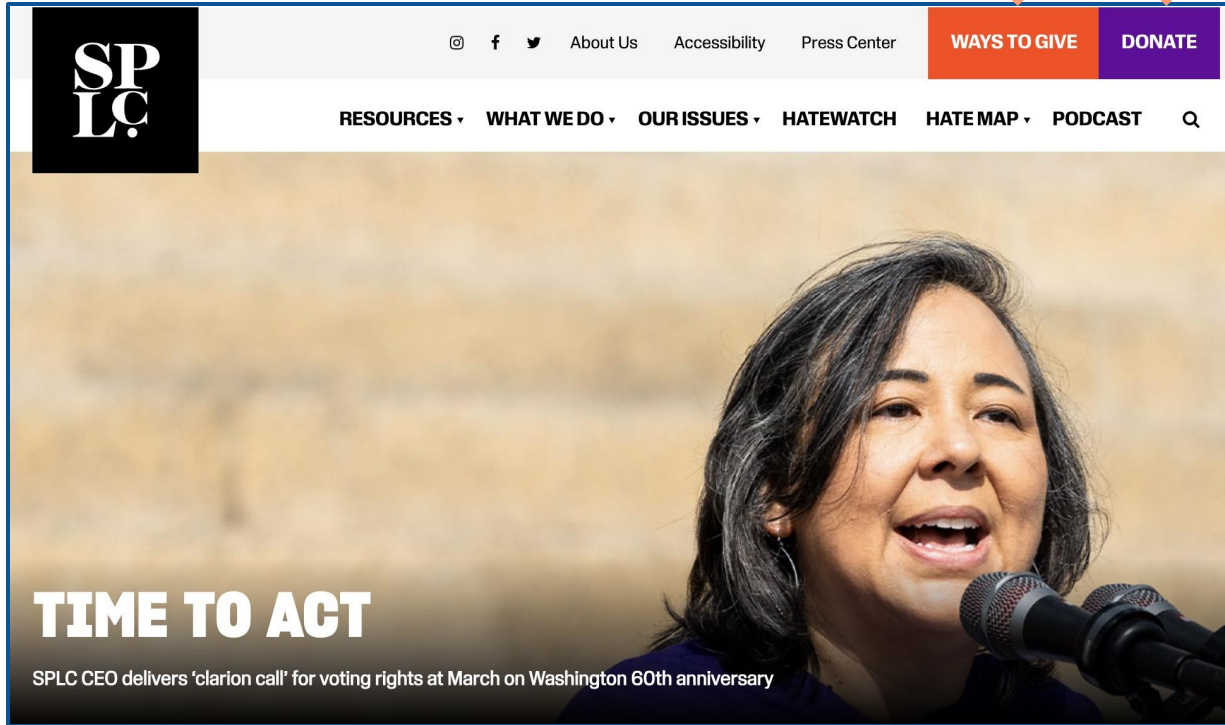


## **GIVE FROM YOUR IRA**

Be a champion for justice with a gift from your IRA



# Sample: Ways to Give page



## THE POWER OF YOUR GIFT

With your support, we're fighting for justice and equity in courts and combating white supremacists who are emboldened and energized. And we're helping teachers across the country create inclusive school communities where children are respected, valued, and welcome participants.

The SPLC is a catalyst for racial justice in the South and beyond, working in partnership with communities to dismantle white supremacy, strengthen intersectional movements, and advance the human rights of all people.

Learn more about [other ways you can support](#) our mission. The best way to support us is by giving a modest amount each month – creating a steady, reliable source of funds to help us make a real difference in the fight for justice and human rights for all people. Click "give monthly" below and a new window will open.

Will you make a gift to help the SPLC fight for justice and equity in courts and combat white supremacy?

### DONATION TYPE



# Sample: Donate page

Effective choices:

- Simple, clean integration
- Placed just above the online donation form
- Best if the links go directly to your FreeWill product

## Support Charity Navigator and make impactful giving easier for all.

Every year, millions of Americans rely on Charity Navigator's ratings and resources to guide their giving. Like the nonprofits we rate, we're a nonprofit that depends on your generosity.

Your tax-deductible gift to Charity Navigator today will help us increase the depth and breadth of our ratings, equipping donors with tools and information to make informed, impactful philanthropic choices.

Thank you in advance for your generosity.

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On this page, you can easily make a secure donation in support of Charity Navigator via credit card, PayPal, Venmo, bank transfer (ACH), or digital wallet.

Review the links below if you'd like to support Charity Navigator with a different donation method:

[Mail](#) | [Stock](#) | [Donor-Advised Funds](#) | [IRA Disbursements](#) | [Cryptocurrency](#) | [Planned Gifts](#) | [more >>](#)

ONE TIME

RECURRING

Choose a **one-time** amount

\$500

\$250

\$50

\$35

USD ▾

\$ *Other*

Dedicate my donation **in honor or in memory** of someone

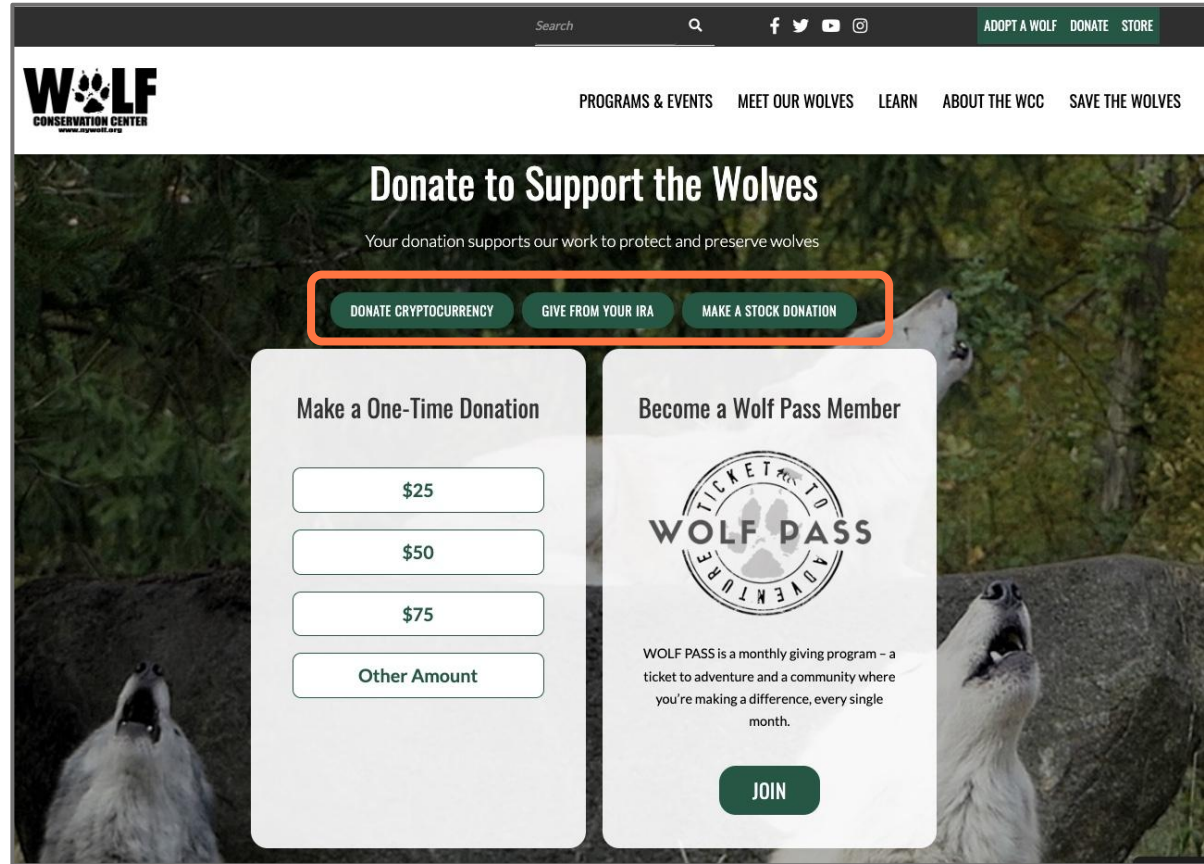




# Sample: Donate page

Effective choices:

- Simple, clean integration
- Placed just above the online donation form
- Buttons instead of text links
- Best if the links go directly to your FreeWill product



# Sample: Stock page

Effective choices:

- Bulleted benefits of giving this way
- Helpful hints about long-term vs. short-term gains, and tips for donating depreciated stock
- Text link to the FreeWill product



## GIFTS OF STOCK AND SECURITIES

Appreciated securities or mutual fund shares that you've owned for more than one year are excellent charitable gifts.

Donating stock or securities offers a number of benefits:

- A federal income charitable contribution tax deduction based on the stock's fair market value on the date of the gift (up to 30% of your adjusted gross income) if the stock was owned for more than one year;
- Carryover of the deduction for up to five additional years if the fair market value of the gift is more than 30% of your adjusted gross income; and
- Avoidance of capital gains tax that is due when you sell appreciated stock.

*Note: Stock owned for one year or less is considered a short-term asset and usually won't produce attractive tax benefits.*

Also, if stock has decreased in value, selling it and making a cash gift to the SPLC is probably more beneficial. You can take a capital loss on federal taxes and still enjoy a charitable deduction up to 50% of your adjusted gross income.

### HOW TO DONATE STOCK

Each stock gift we handle strengthens our programmatic work while providing tax benefits for supporters. [Click here to complete your stock distribution form](#) to send to your broker or

# Sample: QCD page

Effective choices:

- Helpful headers
- Bulleted benefits of giving from one's IRA
- Really friendly, jargon-free, human-centered language



## Smart Giving From Your IRA

Make a difference today and save on taxes. It is possible when you support The Michael J. Fox Foundation through your IRA.

### A Special Opportunity for Those 70½ Years Old and Older

You can give any amount (up to a maximum of \$100,000) per year from your IRA directly to a qualified charity such as The Michael J. Fox Foundation without having to pay income taxes on the money. Gifts of any value \$100,000 or less are eligible for this benefit and you can feel good knowing that you are making a difference at MJFF. This popular gift option is commonly called the IRA charitable rollover, but you may also see it referred to as a qualified charitable distribution, or QCD for short.

#### Why Consider This Gift?

- Your gift will be put to use today, allowing you to see the difference your donation is making.
- Beginning in the year you turn 73, you can use your gift to satisfy all or part of your required minimum distribution (RMD).
- You pay no income taxes on the gift. The transfer generates neither taxable income nor a tax deduction, so you benefit even if you do not itemize your deductions.

# Sample: QCD page

Effective choices:

- Page is linked in the top-line navigation
- Helpful headers
- Links to external resources
- Clear call-to-action

The image shows a screenshot of the American Red Cross website. At the top, there is a navigation bar with the American Red Cross logo and several menu items: "Donate", "Give Blood", "Training & Certification", "Volunteer", "About Us", and "Get Help". A search icon is also present. Below the navigation bar, there is a sidebar on the left with the heading "Ways to Donate Money »" and a list of options: "Donate Online", "Make a Monthly Gift", "Mail, Text or Phone", "Make a Major Gift", and "Where Your Money Goes". At the bottom of the sidebar is a red button that says "Make a Donation >>". The main content area features a large header image with the text "in need." and a search icon. Below the header, there are three sections of text, each with a heading and a paragraph of text. The first section is titled "What is a qualified charitable distribution?" and includes a link to learn more about QCDs. The second section is titled "Who can make a qualified charitable distribution?" and includes a link to learn more about eligibility. The third section is titled "How do I make a qualified charitable distribution to the American Red Cross?" and includes a link to learn more at the bottom. At the bottom right of the page, there is a red button that says "GET STARTED".

Sign In • Español • Your Local Red Cross • Shop the Red Cross Store

American Red Cross Donate ▾ Give Blood ▾ Training & Certification ▾ Volunteer ▾ About Us ▾ Get Help ▾

Ways to Donate Money »

Donate Online

Make a Monthly Gift

Mail, Text or Phone

Make a Major Gift

Where Your Money Goes

Make a Donation >>

in need.

## What is a qualified charitable distribution?

A qualified charitable distribution (QCD) is a distribution of funds from your IRA (other than a SEP or SIMPLE IRA) directly to a qualified charitable organization, such as the American Red Cross. Because the gift goes directly to the charity without passing through your hands, the dollar amount of the gift may be excluded from your taxable income up to a maximum of **\$100,000** annually, with some exceptions. Please consult your tax advisor for information regarding your specific exceptions.

[To learn more about QCDs, please visit IRS.gov »](#)

## Who can make a qualified charitable distribution?

QCDs can be made by IRA owners who are age 70 1/2 or older. QCDs made prior to the age you are required to take a minimum distribution from your retirement assets (pre-Required Minimum Distribution QCDs) will not reduce or otherwise impact future Required Minimum Distribution. Your tax advisor can provide additional information on your particular situation.

Many individuals who are required to take money from their IRA but do not need it for living expenses have chosen to make QCDs from their IRAs to support the work of the Red Cross. This may make sense for you too!

[To learn more about eligibility, please visit IRS.gov »](#)

## How do I make a qualified charitable distribution to the American Red Cross?

Your QCD must be made directly from your IRA custodian to the Red Cross on your behalf. Each financial institution has its own process for initiating a qualified charitable distribution. Account holders can sometimes find it challenging to access the right information. That's why the Red Cross, with our partner FreeWill, is offering a free tool to guide you through the exact process required by the most popular financial institutions. If the forms required by your IRA custodian are not listed on the FreeWill site, the tool can still provide guidance about the steps you'll need to take to make your QCD. Many retirement plan administrators require you to use their distribution forms and comply with other requirements, so follow your financial institution's forms and procedures to ensure you receive any potential tax benefits associated with this gift.

Learn more at the link below.

GET STARTED



# Sample: DAF page

Effective choices:

- Concise text – it's all “above the fold”
- Clear CTA
- Frames why using the tool is helpful to the nonprofit and the donor

The screenshot displays the website for Hope For Paws, an Animal Rescue Organization. The header includes navigation links: About Us, Adoption, Contact, Lucky Leash, Support Us, and a prominent orange DONATE button. A video player is the central focus, showing a dog in a residential area with the text "We traveled far away to make this homeless Newfoundland happy. Now, he is ab...". Below the video is a "More videos" section with thumbnails for "HAWAIIAN FAMILY", "CAVE RESCUE", "COSTA RICA 2", "GISELLE", and "REAL, JUNPER, ANASON AND LOTS OF PUPPIES!". A dropdown menu is open over the "Support Us" link, listing donation methods: Donate Online, Planned Giving, Stock Gifts, Donor Advised Fund, Cryptocurrencies, Corporate Giving, Vehicles, and Give A Gift. To the right, a "Community" section shows donation totals: 5M, 1.7M, and 290K. A "New Address" section provides the organization's contact information: 3940 Laurel Canyon Blvd, Unit 140, Studio City, CA 91604. At the bottom, a "Share video on:" section offers buttons for Facebook, Twitter, and Mail. The video player controls show a progress bar at 0:13 / 4:36.





# Sample: Crypto page

Effective choices:

- Helpful explanation of the tax benefits of giving crypto
- Clear CTA

**Can Do Canines**  
ASSISTANCE DOGS

Home / [Get Involved](#) / [Donate](#) / Donate Cryptocurrency

## Donate Cryptocurrency

We now accept donations of Bitcoin and other cryptocurrencies. Your tax-deductible gift of crypto is converted to U.S. dollars and sent to us so we can put your gift to work toward our mission.

Many cryptocurrencies are highly volatile assets, and can appreciate quickly. When they are sold and converted back into dollars or other fiat currency, income taxes may be owed on any gains. Such taxes, however, can be avoided, if appreciated crypto is donated to charity, rather than converted back into regular currency. For owners who have seen their crypto grow dramatically in value, the tax benefits of donating part of their windfall to charity are substantial, helping them avoid capital gains taxes and maximize the impact of their charitable giving. Such donors may also be able to receive federal income tax deductions, up to the full value of the gift, if they have held their crypto for more than a year.

Donating crypto directly to charity can save you money in two ways:

- Avoid paying capital gains tax on your crypto gains
- Receive a federal income tax deduction for the full value of your crypto (state & local income tax deductions may also be available)

The alternative is to convert your crypto to dollars and make a cash donation, but you would first pay capital gains taxes on the appreciated value, resulting in higher taxes for you and less dollars going to furthering the mission of the charity.

[Donate Crypto](#)



# Sample: Homepage widget

Effective choices:

- Simple integration
- Located right on the organization's home page
- Link can direct right to your Ways to Give page

The screenshot displays the Susan G. Komen homepage with a prominent donation widget. The widget is titled "Secure donation" and features a "Give once" button (selected) and a "Monthly" option with a heart icon. Donation amounts are listed in buttons: \$1,000, \$500, \$300, \$100, \$55, and \$25. A custom amount field shows "\$ 120" and "USD". There is a checkbox for "Dedicate this donation" and a blue "Donate" button at the bottom.

Below the widget, the text reads: "susan g. komen. Donate to help end breast cancer forever. Join us as we support those who need help today, while tirelessly searching for tomorrow's cures. A person is diagnosed with breast cancer nearly every two minutes in the U.S. Your 100% tax-deductible donation will help Susan G. Komen save lives. Having issues? Please call [1-877-GO KOMEN](tel:1-877-GO-KOMEN). [Contact Us](#) · [Other Ways to Give](#) · [Terms and Policies](#)

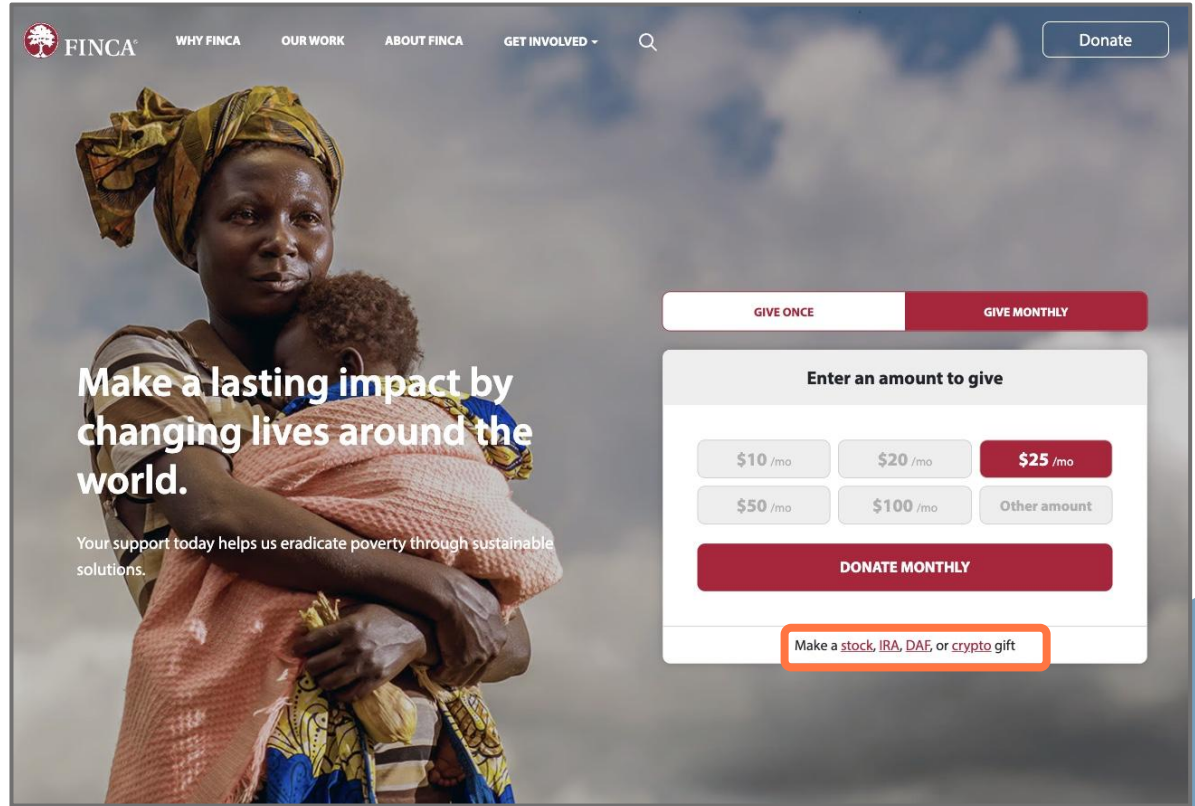
At the bottom of the page, there are links: "Is my donation secure?", "Is this donation tax-deductible?", and "Can I cancel my recurring donation?".



# Sample: Homepage widget

Effective choices:

- Simple, clean integration
- Located right on the organization's home page
- Links can direct right to your FreeWill product or Ways to Give page

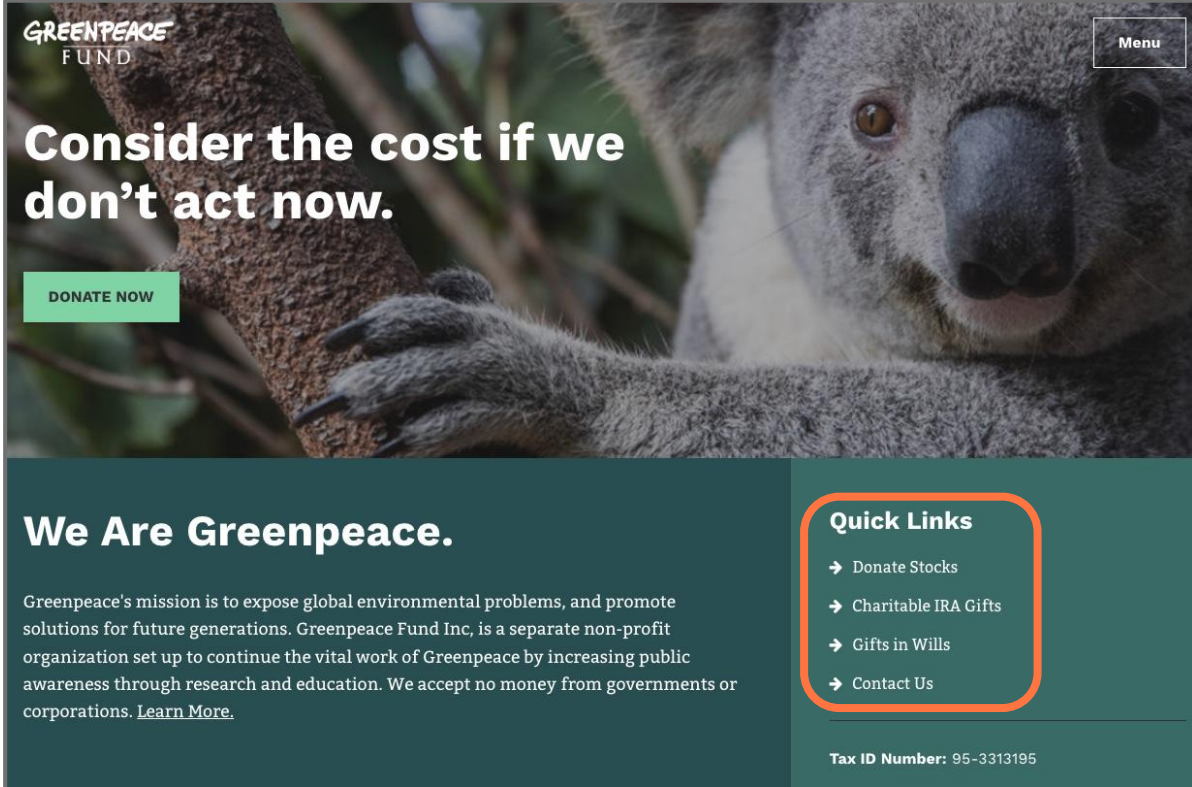




# Sample: Homepage feature

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

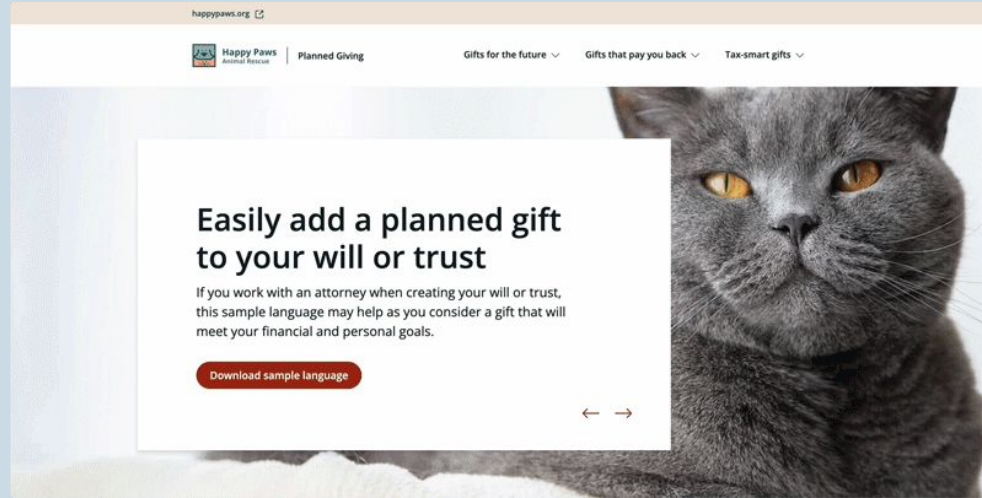
Menu



# Sample: FreeWill microsites

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/>

03

Sending standalone smart gift outreach at key times of year



# Promote smart gifts quarterly

Deploy 4 standalone campaigns each year

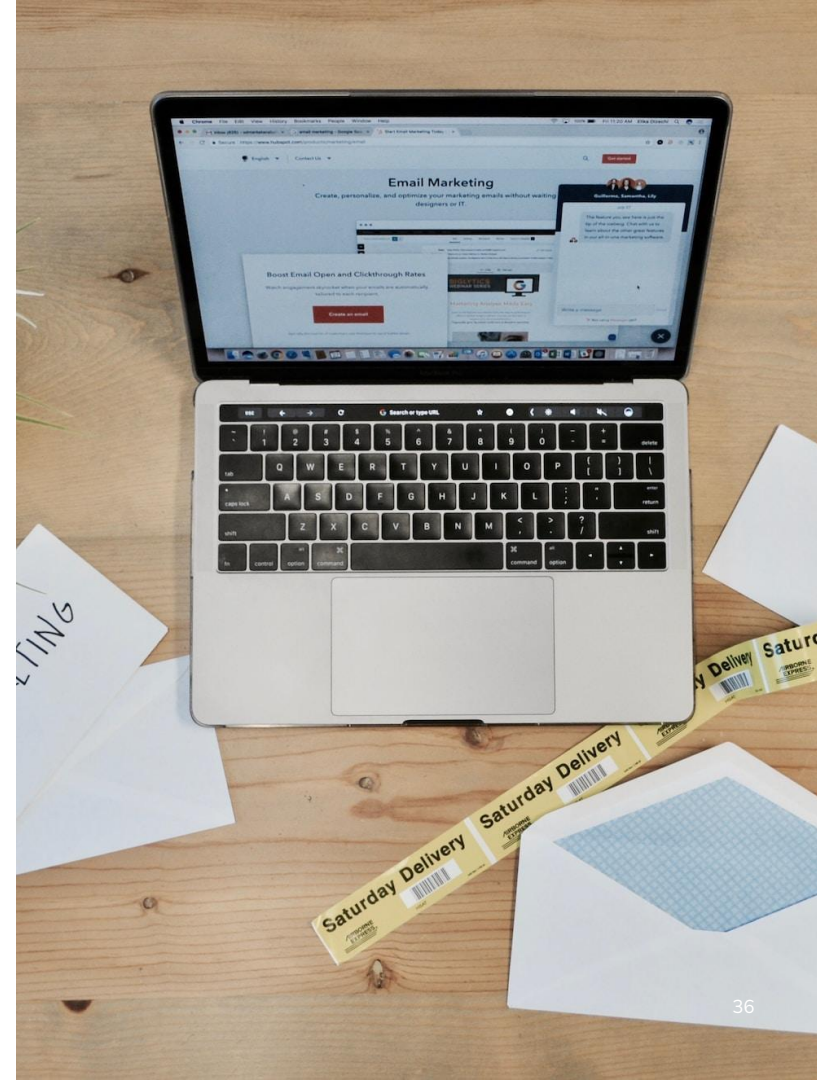
As we know, repetition is essential

Our own data shows that partners who send 3+ pieces of stock outreach throughout the year see 70% more gifts at EOY

To reach the widest audience, cast a wide net, and consider varying the primary communication channel, e.g.:

- Email (2x) – typically a two-part series
- Print (1x) – postcards, letters, buckslip inserts
- Social media (1x)

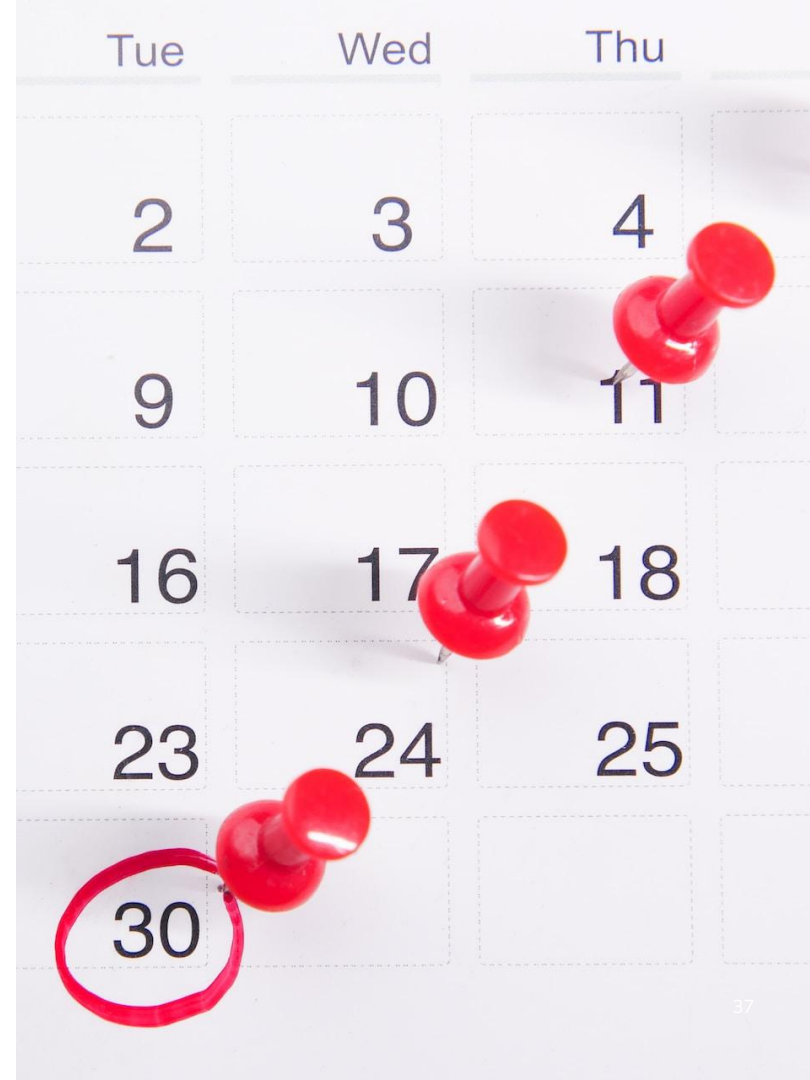
Tie each campaign to a particular campaign or high-energy moment for giving



# High-energy moments for smart giving

Base your plan on FreeWill's recommendations and your org's existing communications calendar

- January: New tax year
- February: New RMD
- April/May: Springtime/Tax Season
- June/July: Midway through the tax year
- September/October: Awareness building in advance of year-end
- October 10: [DAF Day](#) (new this year!)
- Tuesday after Thanksgiving: Giving Tuesday
- Nov. 1 - Dec. 15: End of year fundraising





## Messaging depends on your goal

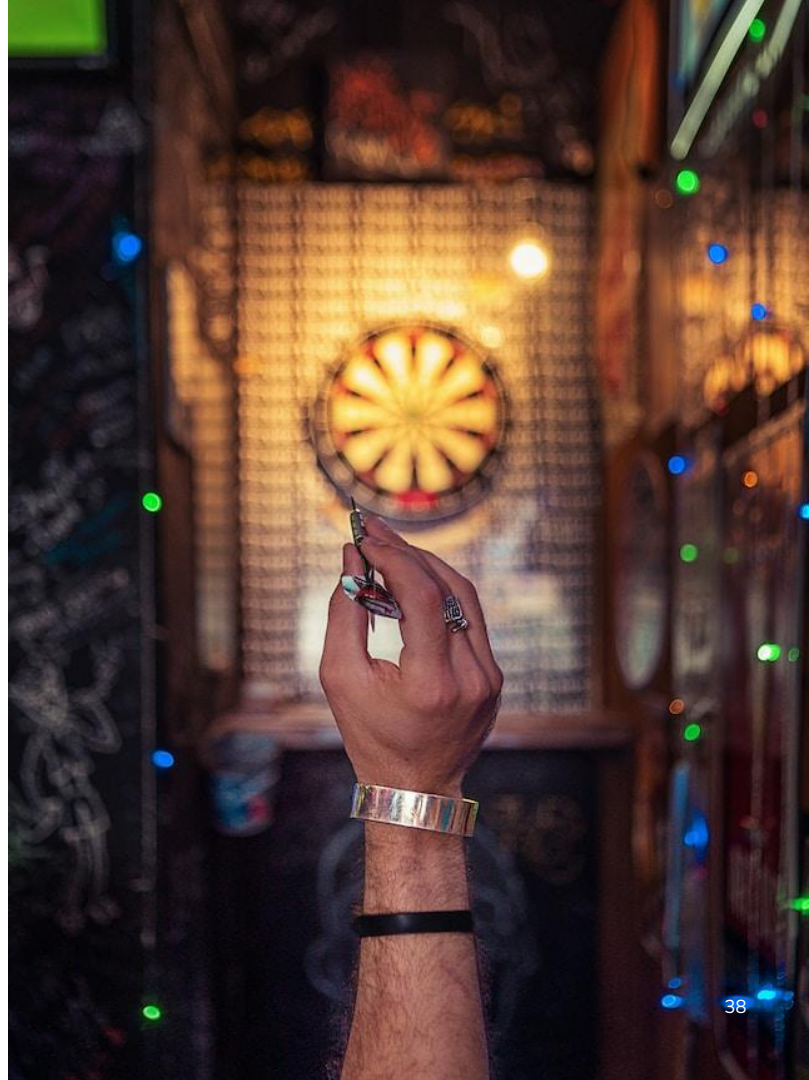
Looking to maximize new smart gifts?

Send outreach promoting a single gift type and directing donors to that **FreeWill product**

- Fulfill your RMD and make an impact – give from your IRA account before Dec. 31!
- It's a great time to give stock – if you give the right stock – learn more today!
- Jane supported [Org] through her Donor-Advised Fund this year – will you?

Looking to increase donor education?

Try a “Ways to Give” campaign promoting multiple giving options and directing donors to your **FreeWill smart giving landing page**



## Keep your audience broad

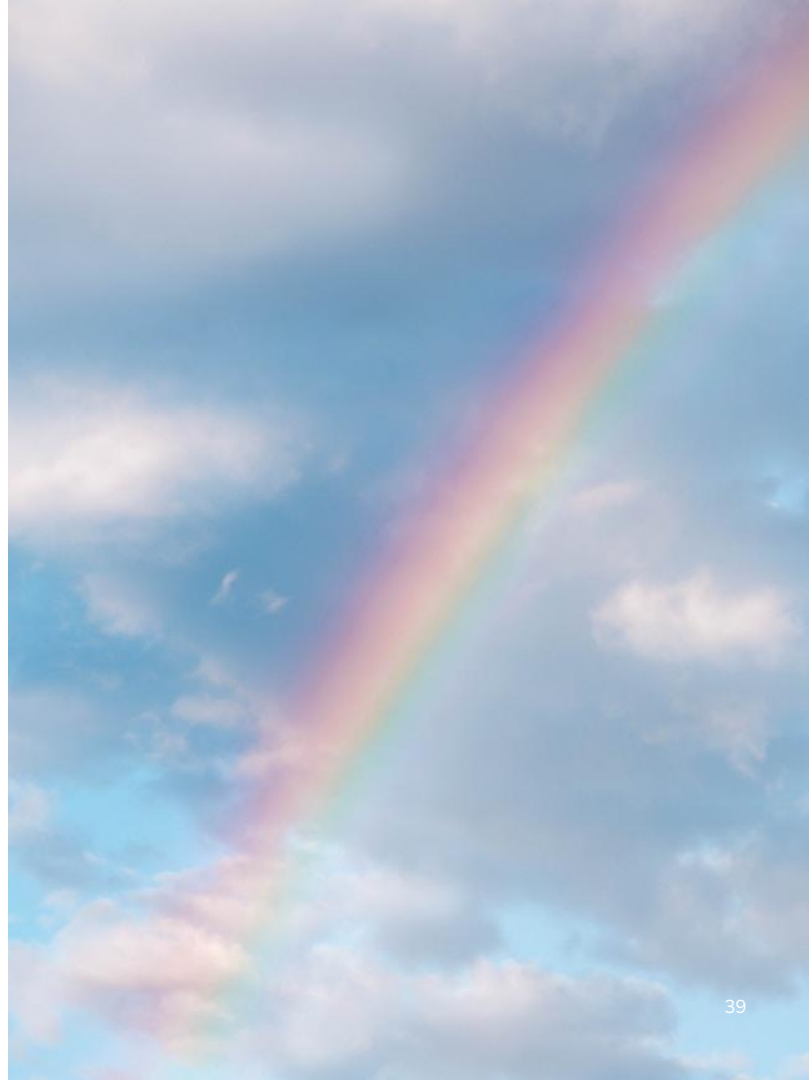
Many of your donors own these assets and hold these accounts

Unfortunately, it's not always clear who holds what!

**Pro Tip: Keep your audience broad in order to reach all potential smart gift donors**

Resist the temptation to segment this outreach too tightly – you'll miss out on the chance to educate and inspire

You're planting seeds and helping your audience be better philanthropists – cast a wide net



# Be thoughtful about your audience

If you absolutely MUST segment...

Send QCD messages to existing donors age 70+, especially if:

- You know they have a traditional IRA account
- They've been giving to you for 10+ years
- They're a current & former Board member
- They've made a QCD gift in the past

Send DAF outreach to:

- Existing donors age 55+
- Those flagged as DAF account holders
- Volunteers (including Board & committees)
- Committed, engaged supporters who involve their family in their giving decisions
- Those who've given from a DAF before





# Be thoughtful about your audience

If you absolutely MUST segment...

Send stock messages to existing donors, esp. If they:

- Are invested in the stock market
- Are married, college educated, and earn \$40K+
- Are, or are closely connected to, an existing or past Board member or executive staffer
- Have business affiliations, like working for a publicly traded company
- Have made a stock gift in the past

Crypto outreach should go to:

- Millennials and Gen Z in your audience
- Existing donors who work in finance/technology
- Those who've given crypto before



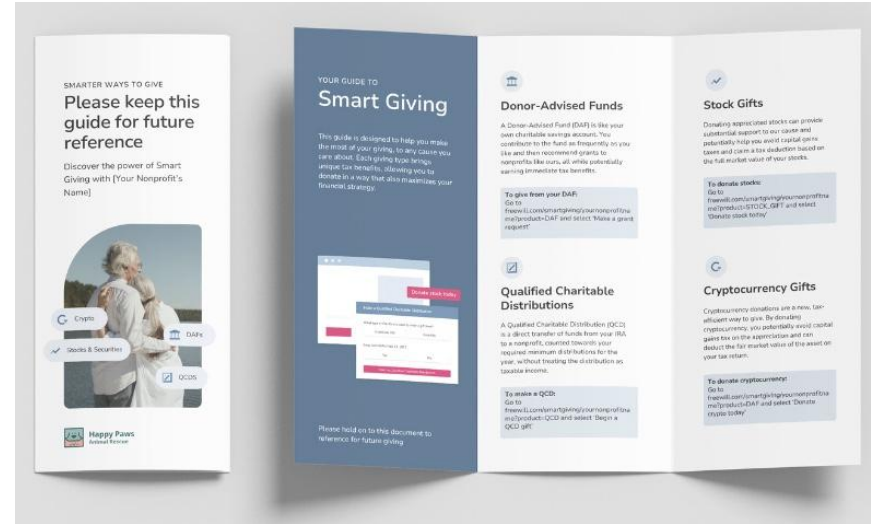
# Utilize the Marketing Library

Sometimes, a personalized print piece or digital asset is what's needed to reach your prospect and grab their attention

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

Access templates for general or sector-specific:

- Brochures
- Postcards
- Permanent "Gift Guide"
- Buckslip inserts
- One-pagers
- FreeWill digital campaign assets, e.g. email headers or social media graphics
- ...with more coming all the time!



## Remember their gift-aversary

Smart gift donors often become repeat smart gift donors

Consider reaching out proactively one month before the anniversary of their last gift with a thoughtful message:

- Share impact stories or mission moments
  - Photos and video are super effective
- Thank the donor for making a difference
- Ask them to once again make a smart gift to your organization
  - Share links to your FreeWill product(s) or smart giving landing page



# Thoughts on social media

Facebook and LinkedIn are most effective

- They're most conducive to sharing info/resources and appeal to a good user demographics
- That said, test posts on whichever platform your audience engages with most

Stay short and concise, but fun – show your organization's voice, so keep things casual

Tracking links are important – use a redirect link or bit.ly for a shorter URL that gets more clicks

Engage with your audience

- Respond to comments
- Like re-shares

Imagery can be as important as messaging



Article: [10 LinkedIn Best Practices for Nonprofits](#)





# Sample: Smart giving email with an infographic

Effective choices:

- Mission language up front
- Educational tone
- Presents all smart giving options in one message
- Infographic makes the content easy to digest
- Quick links to each product
- Postscript explains how using the linked products helps the donor

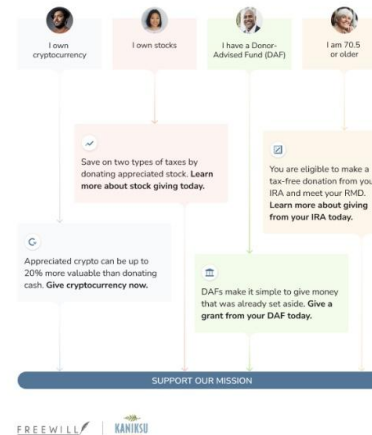


In 2023, Kaniksu Land Trust has ambitious plans to help save the sled hill, and you can join us! I know you share our interest in the property, as it's reflected in the desire to conserve the rural values of the West Pine neighborhood and support creative opportunities for use that benefit the community—all while contributing to an ethic of land stewardship and sustainability.

Folks like you are finding new ways to care for the lands and people of the Kaniksu Region—today, tomorrow, and forever.

More and more, donors like you are making tax-smart gifts to support Kaniksu Land Trust—*instead of donating cash.*

What method of giving is most beneficial for you?



Support Kaniksu Land Trust your way.

- 📧 [Recommend a grant from your Donor-Advised Fund](#)
- 📄 [Transfer your appreciated Stocks & Securities](#)
- 🏠 [Give directly from your IRA](#)
- 🌐 [Donate Cryptocurrency](#)

Best,

[SIGNATURE]

P.S. When you give these types of gifts, **please use the tools linked above** so we can track your gift, send you the right receipt, and ensure you get the tax savings you deserve.

## Sample: QCD email

Effective choices:

- Concise text
- Several links to their QCD product
- Bullet points of what the product does for the donor
- Donor-centric language



# PAUL SMITH'S COLLEGE

Dear {First name},

In case you missed our last email, Paul Smith's College needs your help this year to continue providing a safe, hands-on education for all of our students. But we also want to help you make smart financial decisions in the process.

That is why we are delighted to share our [new resource](#) to help donors 70.5 or older make a tax-free gift from your IRA called a Qualified Charitable Distribution (QCD). [Using this online resource, you can:](#)

- Create your QCD in support of Paul Smith's College
- Request a tax acknowledgment letter for a QCD you've already made
- Download the forms you need if you'd prefer to finalize your QCD offline
- Learn more about giving from your IRA to see if it's right for you!

QCDs must be processed by December 31st, 2020, so if you are interested in making a smart donation, and reducing your tax-burden this year, be sure to [make a gift today!](#)

Thank you for considering a gift that can provide our students with the resources they need for an incredible education, while making smarter decisions for your upcoming taxes. If you have any further questions about this kind of giving, please contact me at (518) 327-6317 or [sfrederick@paulsmiths.edu](mailto:sfrederick@paulsmiths.edu) today.



# Sample: Stock email

Effective choices:

- Engaging image
- Tax benefits explained in 2 bullets
- Highlight the FreeWill partnership
- Mission language
- Signed by a real staff person
- Clear calls-to-action



Did you know there's a simple way to make a difference for our furry friends that can benefit you, too?

When you give Humane Society Naples appreciated securities that you've owned for more than one year, you receive two tax benefits:

1. You are entitled to a federal income tax deduction (if you itemize) based on the current fair market value of the securities, regardless of their original cost.
2. You will be exempt from paying capital gains taxes on any increase in value—taxes you would pay if you sold the stock.

As always, the greatest benefit is knowing that you are sustaining the life-saving work that happens each day and every day at Humane Society Naples. Thank you!

Humane Society Naples has partnered with FreeWill – [a free stock-donation platform](#) – to help you maximize your year-end giving and immediately impact the lives of animals in need. This secure, online resource allows you to donate your appreciated stock directly to HSN and helps you reduce your future tax burden, as there are no capital gains taxes to pay.

As a no-kill shelter, we pride ourselves on providing a sanctuary for all animals in need. Your generosity today can extend our life-saving services while supporting your own savings, allowing you to make the most of your impact this year.

[Donate stock today!](#)

Contact us with any questions about making a gift of stock. Together with your advisor, we can help you fulfill your charitable goals and protect your assets from unnecessary taxes. Best of all, your generosity will protect animals in need!

Sincerely,  
**Kim Hanson**  
Senior Philanthropy Officer  
(239) 643-1555  
[kim.hanson@hsnaples.org](mailto:kim.hanson@hsnaples.org)

[Learn More](#)



# Sample: QCD letter

Effective choices:

- Produced in-house very inexpensively
- Sent to prospects who didn't have an email on file with the org
- Plenty of mission moments shared
- Lots of space to provide more information about IRA giving



<date>



<addressee>  
<address line 1>  
<city>, <state><zip>

Dear <Salutation>,

At Make-A-Wish Arizona, we understand that creating life-changing wishes takes planning.

From the beginning stages of working with wish kids like Desirae, 3, to design their ideal wish (a pink playhouse, of course), to the special "wish reveal" surprise, a wish is created after multiple decisions from the wish kid, the wish family, staff, volunteers, vendors, even our community of donors!



Like planning a wish, planning your future gift to Make-A-Wish Arizona also involves a lot of decisions. We now offer multiple opportunities

for you to create a legacy gift plan that includes Make-A-Wish Arizona so future children battling critical illnesses can have their ideal wishes too.

**"When I turned 72, I was encouraged to make a gift to a charity from my IRA to help lower my tax bill. I selected Make-A-Wish Arizona because I knew the money would go directly to the mission – granting amazing wishes."**

If you are age 72 or older, you may decide to gift a Qualified Charitable Donation using your Required Minimum Distribution (RMD), the amount of money you must withdraw from your account each year to avoid a 50 percent tax penalty on the amount of the distribution.

Donating your RMD amount to Make-A-Wish Arizona may lower your taxable income. You can consult with your tax advisor, administrator of your IRA or Make-A-Wish Arizona has partnered with Free Will, an online estate planning website, to provide a step-by-step guide to estate planning.



# Sample: Smart giving buckslip

Effective choices:

- Printed thousands very inexpensively
- Deployed without additional postage costs
- Effectively combines mission language on the front with gift options and FreeWill URLs on the back



## Now, more than ever, wish kids need your support.

Currently, there are over 400 Colorado wish kids who are waiting to have their life-changing wishes granted. That number continues to grow every day.

Make-A-Wish® Colorado is committed to ensuring that no child waits even one extra day to experience the hope and joy that a wish brings. You can help us make every wish come true by considering a few creative gift options now.

**Make-A-Wish.**  
COLORADO

## Protect your family while leaving a *legacy of wishes*

Writing a will protects the future of the people and causes you love. We've made this process easier than ever with a new online tool that allows you to write your legal will at no personal cost. You may also choose to include a legacy gift to Make-A-Wish Colorado to ensure we can create life-changing wishes for every eligible child - today, tomorrow, and always. Get started on your will at [FreeWill.com/MakeAWishColorado](https://FreeWill.com/MakeAWishColorado).

### Give the gift of stock

You can continue helping to grant wishes—while saving on two types of taxes! Our free, online tool helps you transfer appreciated assets directly to Make-A-Wish Colorado in just a few minutes. A gift of stock can allow you to give more than you think possible, make an even greater impact than a cash gift, and save significantly on your taxes this year. Learn more at [FreeWill.com/Stocks/MakeAWishColorado](https://FreeWill.com/Stocks/MakeAWishColorado).

### Tax-smart giving from your IRA

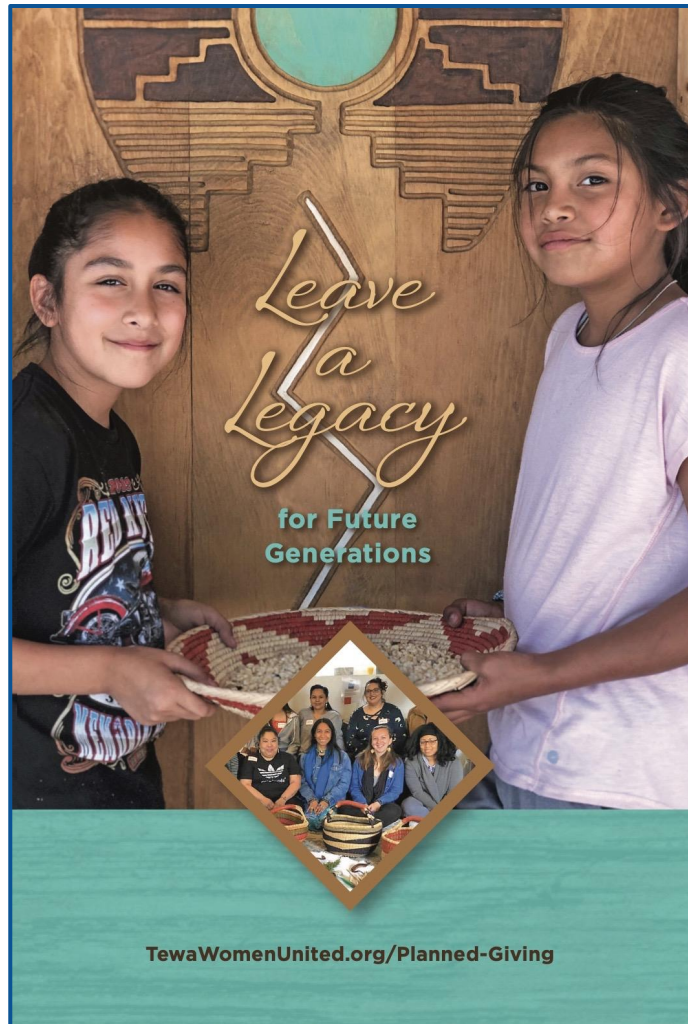
If you are 70.5 or older, you can support Make-A-Wish Colorado the smart way—and save on taxes, even if you don't itemize! Our online tool makes it simple to donate tax-free to Make-A-Wish Colorado directly from your IRA, so that you can make a powerful impact on our work and reduce your future tax burden before the year is out. Give smarter today by visiting [FreeWill.com/QCD/MakeAWishColorado](https://FreeWill.com/QCD/MakeAWishColorado).



# Sample: Smart giving postcard

Effective choices:

- Full color
- Lovely images & design
- Spotlights planned & smart giving
- Included URLs for their FreeWill products
- Many potential use cases



*Wi don gi mu*  
"WE ARE ONE" IN MIND, HEART,  
AND IN THE SPIRIT OF LOVE FOR ALL

Here are three ways to maximize your year-end giving and nurture the collective power of our beloved families, communities, and Nung Ochuu Quiyo.

- **CREATE A LEGACY GIFT** Use our partnership with FreeWill to make your will and build a legacy for future generations. Begin your plans at [FreeWill.com/TewaWomenUnited](https://FreeWill.com/TewaWomenUnited)
- **GIVE FROM YOUR IRA** If you're 70.5 or older and have a traditional IRA, you can use FreeWill to support Tewa Women United without dipping into your cash reserve. Learn more and make an IRA gift at [FreeWill.com/QCD/TewaWomenUnited](https://FreeWill.com/QCD/TewaWomenUnited)
- **DONATE YOUR APPRECIATED STOCK** Save on taxes, while supporting our work in environmental and reproductive justice. Learn more and make your gift at [FreeWill.com/Stocks/TewaWomenUnited](https://FreeWill.com/Stocks/TewaWomenUnited)



TEWA WOMEN UNITED

**FREEWILL**

**Questions? Contact Bernadette Trujillo at:**

[bernadette@tewawomenunited.org](mailto:bernadette@tewawomenunited.org) 505.747.3259 x1205





## Sample: Stock e-news blurb

Effective choices:

- Attention-grabbing photo
- Employed a donor testimonial
- Leveraged this in their e-newsletter and social posts to reach a wider audience

F R E E W I L L 



Fellow volunteer, Geoff Sinclair has been involved with Make-A-Wish Oregon as an Emerging Leaders Board member, a member then the Chair of the Board of Directors, and currently serves on the Ambassador Board. He has given time, talent, and treasure for many years to help make wishes come true. In addition to his entire family, he has recruited countless new friends to the wish granting community and each one has made a lasting impact on the lives of the brave kiddos served by the Make-A-Wish mission.

His most recent family gift was made in the form of appreciated stock. (Did you know that if you have appreciated stock and donate it to Make-A-Wish, it is extremely advantageous from a financial planning perspective in avoiding paying taxes on the capital gains?) Though he had heard about stock giving many times throughout his years of volunteer service, a friend finally got him to do it- and he may never look back. Geoff was the first to try out giving stock through our new partnership with [FreeWill](#) and said "It was so easy!" Thank you for all you have done and all you will continue to do for our kiddos, Geoff.

If you want to learn more about giving gifts of appreciated stock, please contact Emily Edwards, Individual Giving Manager, at [eedwards@oregon.wish.org](mailto:eedwards@oregon.wish.org) or 503-802-7382.





Civil Air Patrol

April 18 at 1:41 PM

Are you looking to make a difference with us and your taxes? By donating a gift of stock to Civil Air Patrol, you can skip the capital gains tax and take a charitable deduction for the entire donation amount if you itemize deductions. This tax season, make a difference with CAP: <https://bit.ly/3NUod83>

#TaxDay #SmartGiving #StockMarket



27

7 Shares

Like

Comment

Share

Most relevant

Most Relevant is selected, so some comments may have been filtered out.

ifaw

16,439 followers

6d

It's the last day to file your taxes! That's why IFAW wants to make sure you know about this tax-smart way to save on future taxes while making an immediate and lasting impact on animals, people, and the places we call home. By donating appreciated stock shares to IFAW, you can make a difference in the lives of endangered animals today.

Discover the many benefits of stock giving here: <https://bit.ly/3ixa7Lo>

Photo: © Harvey Sapir via Pexels



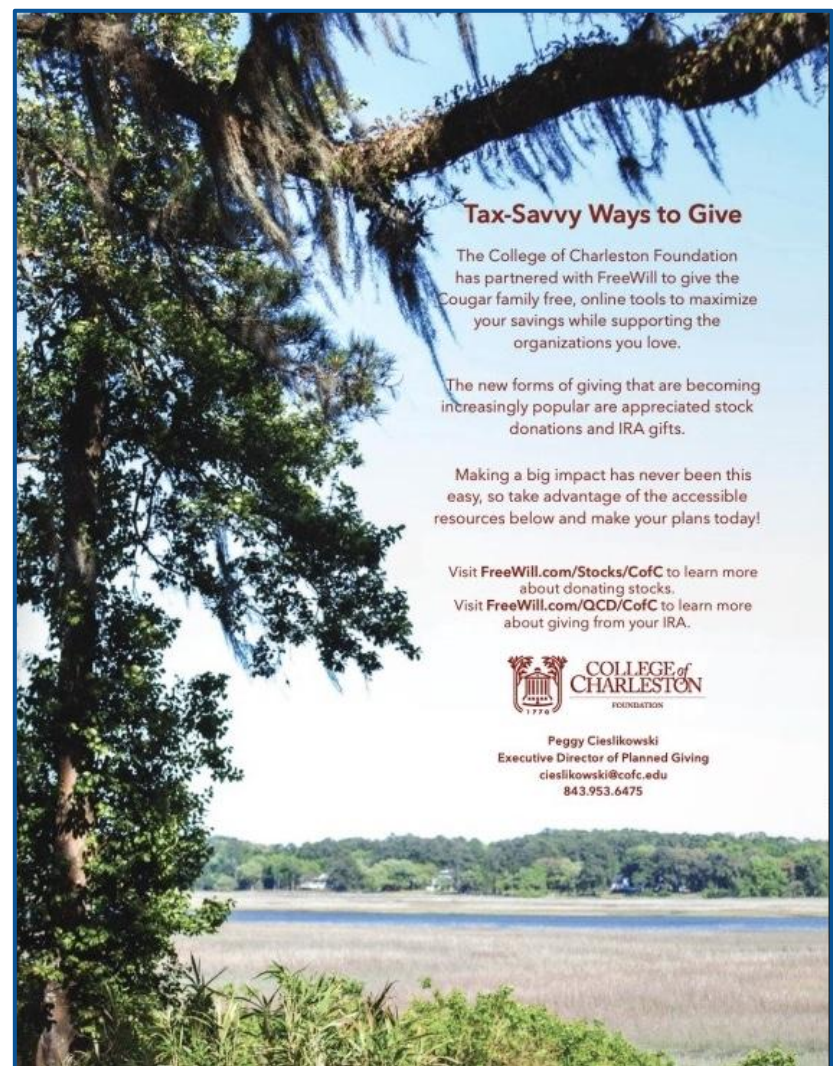
28

3 shares

# Sample: Stock & QCD magazine ad

Effective choices:

- Full-page, full-color ad is attention grabbing
- Tax-savvy framing
- Contact information for a staff person, should the donor have questions
- Reached a large audience




**Tax-Savvy Ways to Give**

The College of Charleston Foundation has partnered with FreeWill to give the Cougar family free, online tools to maximize your savings while supporting the organizations you love.

The new forms of giving that are becoming increasingly popular are appreciated stock donations and IRA gifts.

Making a big impact has never been this easy, so take advantage of the accessible resources below and make your plans today!

Visit [FreeWill.com/Stocks/CofC](https://FreeWill.com/Stocks/CofC) to learn more about donating stocks.  
Visit [FreeWill.com/QCD/CofC](https://FreeWill.com/QCD/CofC) to learn more about giving from your IRA.

 **COLLEGE of CHARLESTON**  
FOUNDATION

Peggy Cieslikowski  
Executive Director of Planned Giving  
[cieslikowski@cofc.edu](mailto:cieslikowski@cofc.edu)  
843.953.6475





# 04 Including smart gift mentions in existing donor outreach

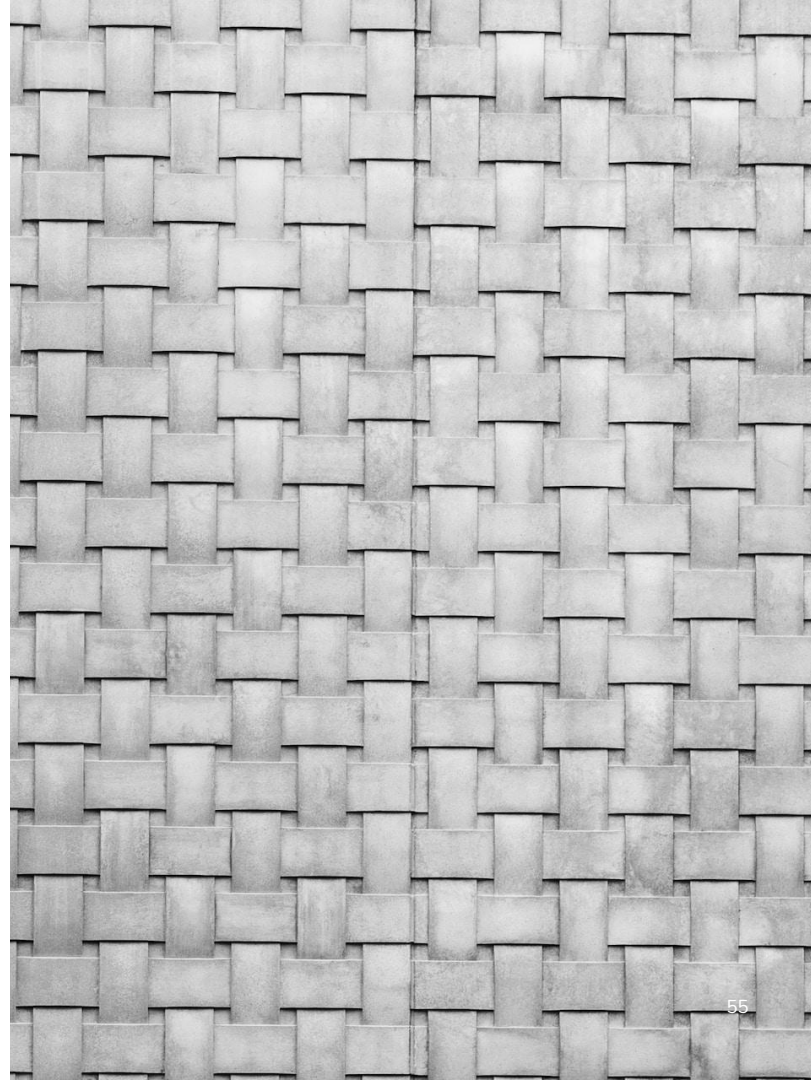


# What is an “integrated mention”?

Including smart giving messaging in existing outreach increases cultivation opportunities

The most common mediums for integrations are:

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





# Why are integrations important?

Repetition is essential – this is known as the “rule of seven”

Donors often don't take the desired action the first time they hear your message, and typically need several reminders

Integrations help ensure your message reaches the donor when they're ready to act

They offer gentle reminders that educate and build comfort and familiarity

They're easy and cost-effective

As with standalone outreach, the messaging will depend on your goal for that integration



# Utilize donor testimonials

Testimonials act as social proof that your organization is worthy of a smart gift

Donor stories inspire others to follow their example

Include testimonials in:

- emails
- social posts
- magazines
- newsletters
- annual reports
- blog posts

## Morris Family

[DONOR ADVISED FUNDS](#) | [DONOR STORIES](#) | [NAMED FUNDS](#)



“JFCS is an organization that I have been fortunate to participate in with my children and grandchildren. Through our donor advised fund and our “Morris Family Endowment Fund” for children and seniors our family is confident that JFCS is providing important services for our community – one individual or family at a time.”

– Natalie-Ann Morris, Marin County



05

Putting it all together:  
End-of-year 2023 campaign



## Campaign Components

**ASAP:** Review your smart giving web content and make improvements, as needed

**September (full month):** 3-part social media campaign with Smart Giving Suite video

- *Use a video to engage donors on a new platform*

**Mid-October:** Newsletter insert about using the FreeWill platform to give

- *Remind donors that by giving back on FreeWill's platform, they are benefiting your organization*

**Early November:** EOY “Smarter Giving” email

- *Encourage donors to consider a smarter gift before the end of the year*



## 2023 End of Year Campaign Overview

# Campaign Components

### **November 28:** Giving Tuesday insert

- *Don't detract from your Giving Tuesday email; instead, provide as many opportunities as possible for donors to support you!*

### **December (ongoing):** Continued integrations into all outreach

- *Non-cash assets are popular end-of-year gifts. Continue providing your donors the chance to give them!*

### **January:** “New Year, New Ways to Give” email

- *Encourage multiple ways to give from the start of the year... and be sure to get it on the calendar today.*



## Bonus tips!

- Promote smart giving during a down economy – donating assets or funds already set aside can help “smooth out” giving during a down market
- Leverage smart giving for special or emergency gift opportunities: campaigns, anniversaries, natural disasters
- Test a matching gift campaign specifically for smart gifts to offer donors an incentive to give *now*
- Ensure your nonprofit’s info is up-to-date on charity rating sites like Charity Navigator, Guidestar, Give.org
- DAFs: If your organization struggles to accept gifts of complex assets, talk to donors about funding a DAF with those complex assets and making cash gifts to you from the DAF
- DAFs: Get to know the leaders of your local community foundation



# 06

## Resources & next steps





TO EXPLORE:  
Resources

- [Adding the FreeWill products to your website](#)
- [FreeWill's Marketing Library](#)
- [FreeWill's animated explainer videos](#)



LOOKING AHEAD:

## Next steps

1. Complete the [post-training survey](#)
2. Share key learnings with your team so you can apply what you've learned and boost your smart giving marketing this year!



# Thank you!

**Lauren Winther-Hansen**  
Nonprofit Training Lead

E. [training@freewill.com](mailto:training@freewill.com)

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