

FREEWILL PARTNER TRAINING

# Smart Giving Solutions (104)



# 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 How FreeWill's smart giving tools help donors and your nonprofit
- 02 Talking points to encourage donors to use the tools for giving
- 03 Live demos of the smart giving tools
- 04 Next steps



01

How the smart giving tools  
simplify giving for donors  
and your nonprofit



## SMART GIFTS

### Real-time gifts

that have an immediate  
impact on your mission

Gifts of appreciated securities

Qualified charitable distributions from IRAs

Grants from donor advised funds

Gifts of cryptocurrency & NFTs



## Smarter ways to give

Nonprofits who invest in non-cash giving grow their fundraising revenue at a rate of **5x-6X** those that don't

---

**97%** of a donor's wealth is likely held in assets

---

Donors can enjoy significant **tax savings** by making a smart gift



# Smart gifts can be challenging

What are the challenges?

These gift types are often unfamiliar to donors, who might not know the tax benefits, and may be unsure how to give in this way

The traditional giving process can be (or appear to be) burdensome or intimidating – finding the right forms, calling the broker / plan administrator for support, tracking down your nonprofit's info

Each broker's / administrator's process is different, so it's hard to offer clear next steps

Many nonprofits receive these gifts with no associated donor information attached – so they can't acknowledge or steward those gifts



# FreeWill creates solutions

How do FreeWill's products solve for these challenges?

- Built-in donor education about smart gifts
- Customized landing page designs that feel like a natural extension of your website
- A warm, intuitive user experience that leads the donor through the process step-by-step
- Facilitation of gifts from industry's top brokers & plan administrators and dozens of cryptocurrencies
- Prompt reporting of gifts initiated or completed
- Data on the effectiveness of your FreeWill smart giving outreach





# Donor education



## Qualified Charitable Distributions

Qualified Charitable Distributions (QCDs), also known as IRA Charitable Rollovers, are the savviest way for individuals age 70½ or older to use their IRAs to maximize their charitable impact.

**I want to learn more about QCDs.**

To learn more about QCDs and why they are a great way to give, visit the link provided below.

[Learn more about QCDs](#)

## A brief guide to Qualified Charitable Distributions

### What are Qualified Charitable Distributions?

Qualified Charitable Distributions (QCDs) are distributions from your Individual Retirement Account (IRA) made directly to a qualified nonprofit organization without having the distribution counted as taxable income.

QCDs are also sometimes referred to as IRA Charitable Rollovers.

Currently, up to \$100,000\* in IRA funds can be counted as QCDs annually. For married couples, each spouse can make QCDs up to the \$100,000 limit for a potential total of \$200,000.

\* The amount that donors can give to charity via QCD will increase by a percentage in 2024 to account for inflation.

### Who is eligible?

If you are 70½ years of age or older and have a Traditional IRA, you are eligible to make a QCD using FreeWill.

### What are the benefits?

#### QCDs can reduce your income taxes

Normally, funds that are distributed from a Traditional IRA are includible in your taxable income, which is likely to increase your overall tax burden. In some cases, this additional income may also move you into a higher tax bracket.

However, QCDs are an exception to this rule—funds go directly from your IRA to your chosen charitable organization without going to you first, thereby lowering your adjusted gross income and effectively reducing your income taxes.

#### QCDs can satisfy Required Minimum Distributions

Required Minimum Distributions (RMDs) are amounts that you must withdraw annually from your Traditional IRA once you're eligible (as of 1/1/2023, the age to start taking RMDs increased from age 72 to age 73, with the exception of donors who turned 72 before January 1, 2023).

If you do not withdraw your RMD, you will face a penalty tax of 25% of the required withdrawal amount. QCDs can be used to meet this RMD requirement and avoid penalties.

[Read more about RMDs on the IRS website](#)



# Custom landing pages

When you join the American Kidney Fund's fight, you change lives. You help us empower people to prevent kidney disease and slow its progression. You make lifesaving health care affordable and accessible for patients. You support innovations in education for patients and professionals. And, you promote advances in nephrology research. 97 cents of every invested dollar makes a difference as we are the most efficient, highest-rated national kidney nonprofit in the United States.



## Qualified Charitable Distributions

Qualified Charitable Distributions (QCDs), also known as IRA Charitable Rollovers, are the savviest way for individuals age 70½ or older to use their IRAs to maximize their charitable impact.

Whether you want to make a QCD gift to the American Kidney Fund today, request a tax acknowledgment letter for a gift already made, or just learn more about QCDs, you can find resources for each below.



## Start a grant from your donor-advised fund (DAF)

Use the form below to provide details about your intended grant to Amnesty International USA from your donor-advised fund. This information makes it easier to locate your gift when it arrives, thank you for your support, and ensure your gift goes to the right place.


Upon submission of this form, you'll be redirected to your DAF sponsor's website to finish the granting process.

How much will you grant to Amnesty International USA?

Use this space below to leave a message to Amnesty International USA (optional):




# Smart giving landing page



## Maximize your impact

Join Acme in creating a positive change in the world. Your donation can help make a tangible difference in the lives of individuals and communities.


Receive tax benefits and make the most of your contribution by donating non-cash assets.





- Stocks or other securities
- Cryptocurrency
- Donor-advised Fund (DAF)
- Individual Retirement Account (IRA)

### Donating stock and securities doesn't have to be complicated.

When you donate securities, you make an outsized impact without taking money directly out of your bank account. Plus, neither you nor Acme will be taxed on the gains for appreciated assets you donate.

[Donate stock today](#) Powered by 

 Done in under 10 minutes  Secure and encrypted

#### How it works

1. Provide your contact information and donation details, such as: brokerage name, account number, stock name, and number of shares
2. Confirm your email
3. Submit your documents securely online through DocuSign or choose to print and mail the completed forms yourself

#### What happens next

Your brokerage will transfer your securities directly to ours. You'll receive an acknowledgment for tax purposes once we receive the securities.



# Intuitive user experiences

ABOUT YOU      GIFT DETAILS      PERSONALIZE      **REVIEW**      SIGN

## Review your gift details

FreeWill uses DocuSign to allow you to securely input your information and sign your documents electronically. You will not be able to edit your documents once the DocuSign process is completed.

### Your information

LaurenTEST Winther-HansenTEST  
lwinther-hansen@freewill.com  
(202) 555-1212

123 Test St,  
Annapolis, MD 21401

SECURITY	CURRENT VALUE
SBUX	\$5002.00
50 shares	<a href="#">Edit</a> <a href="#">Delete</a>

+ Add stock, bond, mutual fund or other security

[Edit](#)


### Designation

ACME  
Area of Greatest Need

[Edit](#)

### Message


You helped my family in 2005. I'm honored to support your important work.



# Top brokers & custodians

Provide details about your gift

Your financial institution

Choose one... 

Your account type

Securities to transfer

Donors generally incur the greatest tax benefit when donating stock that has been held for more than a year. Please contact your brokerage if you have any questions.

You'll need your account number on the final step for the brokerage form. Please make note of your

Provide details about your gift

Which custodian is your traditional IRA with?

Would you like to estimate your Required Minimum Distribution (RMD)?

The Required Minimum Distribution (RMD) is the smallest amount certain individuals must distribute from their IRA each year. The penalty for missing an RMD is 25% of the amount that was supposed to have been distributed. Whether you are subject to the RMD and the specific amount of the RMD depends on your age.

How much would you like to donate from your IRA?






\$

Note: Contributions you make to your IRA after you turn 70½ may reduce the amount you are allowed to claim as a QCD.

Chariot

Select your Donor Advised Fund

Search

-  Fidelity Charitable
-  National Philanthropic Trust
-  Vanguard Charitable
-  Chicago Community Trust
-  Silicon Valley Community Foundation

By selecting a provider, you agree to Chariot's Terms of Service and Privacy Policy for account usage.

What is a Donor Advised Fund?



# Prompt reporting

Hello,

Great news! A donor has initiated new stock gift(s) to Columbia University.

**2**  
Stock Gift(s)  
**\$50,000**  
Estimated Value

[View Details in the Partner Portal](#)

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](#).

Gifts

## Real-time Gifts

STATUS	ENTRY DATE	ASSET TYPE	VALUE	ORGANIZATION	DONOR	LOCATION	SOURCE
Started	Jul 19, 2023	Stock	\$1,950.85 (E)(4)	ACME, Inc. Acme Corporation	test test	Tucson, AZ	/stocks/acme
Started	Jun 28, 2023	Stock	\$4,142.49 (E)(4)	ACME, Inc. Acme Corporation	Eliana Kane	Brooklyn, NY	/stocks/acme
In transit	May 31, 2023	Stock	\$666.00 (E)(4)	ACME, Inc. Acme Corporation	Omar Suham Antila	Wyndmoor, PA	/stocks/acme
Received	May 25, 2023	Stock	\$15.00 (E)(4)	ACME, Inc. Acme Corporation	Holly Castilla	Albuquerque, NM	Unknown
Received	May 25, 2023	Stock	\$15.00 (E)(4)	ACME, Inc. Acme Corporation	Elizabeth Test	San Diego, CA	Unknown
In transit	May 25, 2023	Stock	\$666,666.00 (E)(4)	ACME, Inc. Acme Corporation	Omar Suham Antila	Wyndmoor, PA	/stocks/acme
In transit	May 12, 2023	Stock	\$1,000.00 (E)(4)	ACME, Inc. Acme Corporation	Tara C Young	Georgetown, TX	/stocks/acme
Received	May 11, 2023	Stock	\$6,202.20 (E)(4)	ACME, Inc. Acme Corporation	Janice Test Park Test	san francisco, CA	/stocks/acme
In transit	May 11, 2023	Stock	\$10,853.85 (E)(4)	ACME, Inc. Acme Corporation	Janice Test Park Test	san francisco, CA	/stocks/acme
Identified	May 11, 2023	Stock	\$8,687.50 (E)(4)	ACME, Inc. Acme Corporation	Janice Test Park Test	san francisco, CA	/stocks/acme
In transit	May 5, 2023	Stock	\$346.54 (E)(4)	ACME, Inc. Acme Corporation	Heather Finn	Schenectady, NY	/stocks/acme
In transit	Apr 27, 2023	Stock	\$5,000.00 (E)(4)	ACME, Inc. Acme Corporation	Tara C Young	Georgetown, TX	/stocks/acme
In transit	Apr 27, 2023	Stock	\$10,000.00 (E)(4)	ACME, Inc. Acme Corporation	Tara C Young	Georgetown, TX	/stocks/acme

## Requests

STATUS	ENTRY DATE	REQUEST TYPE	NAME	EMAIL	PHONE
Incomplete	May 31, 2023	Tax acknowledgement QCD	Lauren TEST Winther-Hanse...	lwinther-hansen@yahoo.com	(410) 555-1212
Incomplete	Apr 20, 2022	Information request	Test Test	jparkers122+test@gmail.com	(281) 330-8004
Incomplete	Jul 12, 2021	Information request	Brianne TEST Thompson-Ma...	brianne@feewell.com	(201) 742-3306
Incomplete	Jun 9, 2021	Information request	Wendy Irving	irving@buffalo.edu	(716) 881-7484
Incomplete	Apr 1, 2021	Information request	Barbara Haramis	bharamis@ctf4ids.org	(732) 998-1431
Incomplete	Mar 31, 2021	Information request	Kim Kosa	kimberlykosa@gmail.com	(617) 513-3546
Complete	Nov 10, 2022	Information request	Salchicha Myung	jiinjennyshin+chachastock@gmail.com	(201) 351-4654
Complete	Sep 23, 2022	Information request	Emilio Alejandro Barreiro	emilioebar06+1@gmail.com	-
Complete	Oct 8, 2021	Information request	Oogi Myung	jiinjennyshin@gmail.com	(201) 555-5555
Complete	May 12, 2021	Information request	Madéleine Novack	madeleine203482@gmail.com	(201) 572-8395
Complete	Feb 11, 2021	Information request	Carla Robinson	carla@slaf.org	-
Complete	Feb 9, 2021	Information request	Ellen M Miller	EMiller@marian.org	-
Complete	Jan 29, 2021	Information request	Reina Gabai	reinalgabai@gmail.com	(609) 968-3963

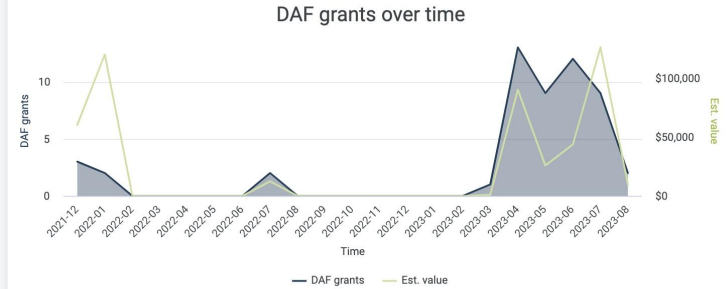


# Data & analytics



### Campaign performance summary (beta)

UTM campaign	UTM medium	Entry path	Traffic	Total stock gifts	Stock gifts completed	Est. value
1		/acme	4,709	3	1	\$28,692
2		/stocks/acme	4,059	136	103	\$1,645,957
3		/qcd/acme	1,514	3	2	\$22,441
4		/smartgiving/omar	16	0	0	\$0
5	omartest	/smartgiving/acme	3	0	0	\$0



### Campaign performance summary (beta)

UTM campaign	UTM medium	Entry path	Traffic	Total DAF grants	Est. value
1		/acme	4,709	1	\$1,234
2		/stocks/acme	4,059	8	\$15,130
3		/qcd/acme	1,514	5	\$9,033
4		/daf/acme	161	6	\$46,610
5	acme_homepage-c...	fwpg	147	1	\$2,550
6	cdcfoundation_web...	website	1	1	\$12,345



02

Talking points to encourage  
donors to use the tools for giving





# Why should donors use your smart giving products to make their gift?

These online tools:

- Are easy to find on your organization's website when the donor is ready to give
- Save the donor time and simplify the giving process
- Easily facilitate gifts from all top brokers / custodians
- Enable financial advisors to give stock on behalf of clients
- Ensure donors are properly credited and acknowledged for their gifts
- Alert you that a gift is on its way, so you can quickly credit and acknowledge the donor when it arrives
- Save your organization time and energy matching contributions with the initiating donor



# Talking points

- *“Ready to give from your IRA? Please use our online tool to initiate the process. It will pre-populate the correct form for your plan administrator so you can easily mail it in. We’ll be on the lookout for your gift and will send you a receipt promptly.”*
- *“To give stock, use our easy online tool. We’ll know your gift is on its way and can send you a receipt promptly, so you get the tax savings you deserve.”*
  - *“If you’d like to work through your own broker, invite them to use the online tool on your behalf, or access our transfer information [here](#).”*
- *“To give from your DAF now, use our online tool so we can properly credit and thank you when the grant arrives.”*
- *“Use our easy online tool to donate crypto and support our important work.”*

Also, ask the donor for feedback on the tool’s ease of use!



# 03

## Exploring the smart giving tools



# Qualified Charitable Distributions with FreeWill



# QCD Gifts with FreeWill

Helpful features:

1. Customizations let visitors know they landed in the right place



## Qualified Charitable Distributions

Qualified Charitable Distributions (QCDs), also known as IRA Charitable Rollovers, are the savviest way for individuals age 70½ or older to use their IRAs to maximize their charitable impact.

Whether you want to make a QCD gift to ACME today, request a tax acknowledgment letter for a gift already made, or just learn more about QCDs, you can find resources for each below.

What can we help you with?

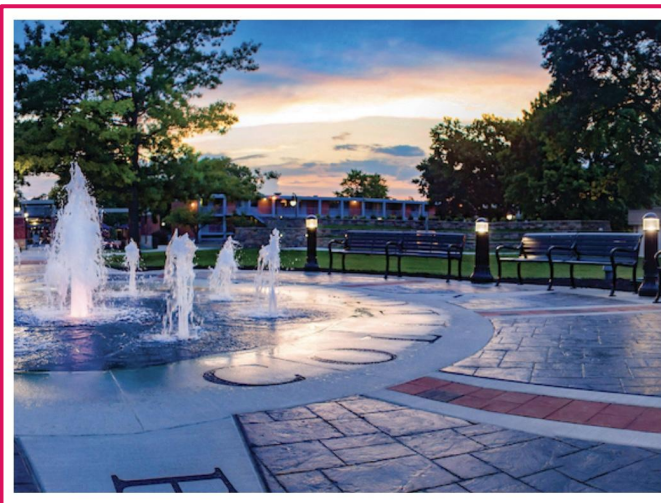
I want to make a QCD gift to ACME.

Thanks to our partnership with FreeWill, you can make your QCD gift quickly and hassle-free by beginning your forms online. You can also choose to print out blank forms to complete by hand, or transact the gift over the phone with your financial custodian. Whatever you choose, we'll provide helpful directions along the way.

[Begin QCD gift online](#)

[Complete manually or by phone](#)

Columbia College's mission is to discover, preserve and disseminate knowledge, to educate the next generation of global citizens, and to promote a culture of broad inquiry throughout and beyond the Columbia community. Columbia also aims, through public service, to enhance the lives and livelihoods of students, the people of the United States and others around the world.



# QCD Gifts with FreeWill

## Helpful features:

1. Customizations let visitors know they landed in the right place
2. Clear paths available for those who want to begin their gift online and those who plan to complete the gift by mail / phone
3. Option to request a tax acknowledgement letter for a QCD made previously
4. Opportunity to learn more about the mechanics and benefits of QCD giving

### What can we help you with?

#### I want to make a QCD gift to ACME.

Thanks to our partnership with FreeWill, you can make your QCD gift quickly and hassle-free by beginning your forms online. You can also choose to print out blank forms to complete by hand, or transact the gift over the phone with your financial custodian. Whatever you choose, we'll provide helpful directions along the way.

[Begin QCD gift online](#)

[Complete manually or by phone](#)

#### I've already made a QCD gift to ACME and I need a tax acknowledgement letter.

Thank you for your support! If you've already given a QCD gift to ACME and haven't yet received your acknowledgement letter, please report your gift details so that we can verify your gift and provide you with your letter.

[Request tax acknowledgement letter](#)

#### I want to learn more about QCDs.

To learn more about QCDs and why they are a great way to give, visit the link provided below.

[Learn more about QCDs](#)



# QCD Gifts with FreeWill

Upon completion:

1. PDF document with a cover page of instructions to finish the process



## Thanks for using FreeWill! You're almost done! Follow these steps for your QCD to be processed.

### Read

- Read your IRA distribution form carefully, and make sure you understand everything.
- If there's anything you feel like you don't understand, please call Morgan Stanley at 800-280-4534 (senior investor helpline), option 1.

### Fill

- Use a black ink pen.
- In the upper right corner of each page of the form, fill in account number.
- In the attached letter of instructions, fill in your account number.

### Sign

- Sign and date the form in the Section 14.
- Sign and date the attached letter of instructions to ensure you receive acknowledgement of your gift for your tax records.

### Mail Form

- Send both this form and the attached letter of instructions to:  
Morgan Stanley  
PO Box 290157  
Tampa, FL 33687
- If you intend for your Qualified Charitable Distribution to count for the current tax year, you must mail these forms to your IRA custodian in time for your IRA custodian to process your request by December 31. It usually takes 5-10 business days from the day your form is received by your IRA custodian to the day the nonprofit receives the gift, but the end-of-year period is especially busy for IRA custodians and charities, so wait times may be longer. It's best to have all signed requests into your IRA custodian no later than December 15th. If there are any questions or concerns, you should reach out to your IRA custodian directly.



# QCD Gifts with FreeWill

Upon completion:

1. PDF document with a cover page of instructions to finish the process
2. Pre-populated gift form – note that we don't collect account numbers or other sensitive info

Morgan Stanley

Branch # \_\_\_\_\_ IRA Account # \_\_\_\_\_ 05/PM# \_\_\_\_\_

## IRA Distribution Form — Please Return All Pages

**Section 1 — IRA Type:**  Traditional IRA  Roth IRA  SEP/SAR-SEP IRA  SIMPLE IRA  Inherited IRA

**Section 2 — Payee Information:**  IRA Owner  Beneficiary

LaurenTEST Winther-HansenTEST  
 NAME  
 123 Test St  
 ADDRESS  
 Annapolis MD 21401  
 CITY STATE ZIP

Required Only For Living Beneficiary: Social Security Number \_\_\_\_\_ and Date of Birth \_\_\_\_\_

Required Only For Non-Living Beneficiary: Tax Identification Number \_\_\_\_\_

### Section 3 — Reason for Distribution Request (select one)

#### Over Age 59½

Normal Distribution

Under Age 59½ (penalty may apply)

Premature Distribution  72(t) Substantially Equal Periodic Payments (also complete Section 7)

#### Other — Additional Documentation May Be Required

Death of Account Owner (Certified Death Certificate and Notarized Affidavit of Domicile and Debts required for initial distribution only. Not required for Inherited IRA)

Trust and Estate Beneficiaries must provide additional documentation (complete Section 8).

Direct Rollover to a Qualified Retirement Plan (Attach qualified plan letter of acceptance)

(For External Rollovers only, also provide Plan Name and Address below. Use this form for checks only)

Refund of Excess Contribution Tax Year \_\_\_\_\_ Principal \$ \_\_\_\_\_ Earnings \$ \_\_\_\_\_ (Refer to IRS Publication 590 or consult with your own tax advisor. If the refund of excess contribution is withdrawn before your tax filing due date, including extensions, the earnings must be calculated (in accordance with IRS rules) and withdrawn with the excess contribution.)

Qualified Charitable Distribution; Name of Charity: ACME, Inc. (EIN: 12-1234567)

Charity Address: 1234 Main Street, New York, NY 10001

Disability  External Money Manager Fees (attach invoice)

Note: Do not complete this form for IRA transfers incident to divorce. Submit the "Letter of Authorization to Process IRA Transfer Incident to Divorce" (available on Forms Gallery).

### Section 4 — Payment Amount and Frequency (check all that apply)

#### Payment Amount

Gross Amount \$ 5000.00

All Available Cash

Dividend & Interest

Dividend, Interest & Principal

Account Termination

If this recurring payment is for AUTO-RMD, check this box and also complete Section 9.

In-Kind (Use the grid provided below; attach additional sheets if needed)

#### Frequency

One-Time Partial Payment

Recurring Start Date\*:

Daily  Weekly  Every Other Week  Monthly

First business day of the month  Last business day of the month

Every 3 months  Every 6 months  Annually

Note: \*Recurring payment instructions will continue until we receive written instructions to cancel them.

#### List Specific Assets In-Kind:

Quantity (shares/units)	Name of Security or Trading Symbol

### Section 5 — Verbal Distribution Authorization (VDA) (check box to select VDA)

Variable amount and distribution delivery method to be determined by the account holder for each payment. I authorize Morgan Stanley Smith Barney LLC ("Morgan Stanley") to accept verbal requests for these amounts that I may make from time to time. I understand that verbal distributions require a withholding election that will be used for all future verbal distributions. Any changes to withholding requires written authorization by completing a new distribution form. Internal Transfers to another Morgan Stanley nonretirement account require that the IRA owner's name and tax identification number match the retail account. Verbal distributions can be processed 1) in cash, via check or wire out, 2) ACH out in cash to the IRA owner's external bank account or 3) cash or in-kind as an internal journal to the IRA owner's Morgan Stanley nonretirement account. If checked, please complete both Sections #10 and 11.



RETIRACD WFD

PLEASE RETURN ALL PAGES

IRA DISTRIBUTION FORM  
(02/2020) RETIRACD

PAGE 1 OF 6  
NY CS 9706902 02/2020





# QCD Gifts with FreeWill

Upon completion:

1. PDF document with a cover page of instructions to finish the process
2. Pre-populated gift form – note that we don't collect account numbers or other sensitive info
3. Cover letter to include with the gift form, asking that they be identified as the donor of record

08/01/2023  
Morgan Stanley  
PO Box 290157  
Tampa, FL 33687

Re: Request for Qualified Charitable Distribution from Individual Retirement Account (IRA)

To whom it may concern,

I have attached the required form to request to make a Qualified Charitable Distribution from my Individual Retirement Account, as provided by the Tax Increase Prevention Act of 2015 and Sec. 408(d)(8) of the Internal Revenue Code of 1986.

Please issue a one-time check in the amount of \$5,000.00 payable to ACME, Inc., EIN: 12-1234567, at the following address:

ACME, Inc.  
1234 Main Street  
New York, NY, 10001

**In your transmittal to this charity, please state my name and address as the donor of record in connection with this transfer.**

It is my intention to have this transfer qualify during the 2023 tax year. Therefore, please make certain that this distribution is postmarked no later than December 31, 2023.

If you have any questions or concerns regarding this request, I can be reached at 202-555-1212 and [lwinter-hansen@freewill.com](mailto:lwinter-hansen@freewill.com).

Thank you for your assistance.

Sincerely,

LaurenTEST Winther-HansenTEST

Date:

Account Number:



# Demo time!

[freewill.com/qcd/happypaws](https://freewill.com/qcd/happypaws)



# Stock Gifts with FreeWill



# Stock Gifts with FreeWill

## Helpful features:

1. Customizations let visitors know they landed in the right place
2. Opportunity to learn more about how stock gifts work, and the benefits
3. Brief process overview right on the landing page



## Maximize your impact

When you gift stocks and other securities directly to a charity, you make an outsized impact without taking money directly out of your bank account. Plus, neither you nor the charity will be taxed on the gains for appreciated assets you donate.

Meet your giving goals, enjoy potential tax benefits, and contribute to the change you want to see. That's a triple-win.

Donate stock today

[Learn more about the benefits of gifting securities](#)



## How it works

1

### Select which securities to donate

You'll need your brokerage name, account number, stock name, and number of shares you want to donate. Donors generally incur the greatest tax benefit when donating appreciated stock that has been held for more than a year. Please contact your brokerage if you have any questions.

2

### Submit a request to transfer the securities

Use our free online tool to complete the necessary forms in as little as ten minutes. Submit them securely online through DocuSign or choose to print and mail the completed forms yourself.

3

### Charity receives your gift

Your stock is transferred to ACME. Once complete, you'll receive a tax acknowledgment for the market value of your gift.



# Stock Gifts with FreeWill

## Helpful features:

1. Customizations let visitors know they landed in the right place
2. Opportunity to learn more about how stock gifts work, and the benefits
3. Brief process overview right on the landing page
4. Info on how the product simplifies giving, plus info about FreeWill and user testimonials on ease of use

## Simplify stock gifts with FreeWill

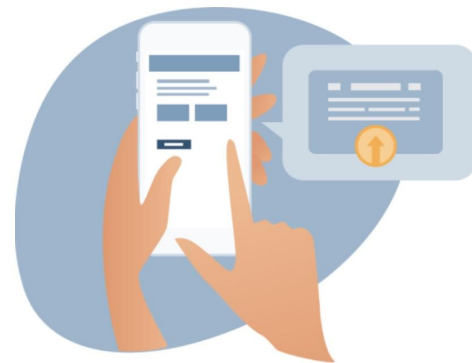
ACME works with FreeWill's platform, making it easy for you to donate stock and other securities.

### Save time for yourself and the charity

If you gift stocks through your brokerage, charities are provided limited information about the gift. It can be difficult for them to match stock gifts with donors. When you use this tool, charities automatically know who sent the gift for recognition and tax acknowledgement purposes. It's less administrative overhead for charities.

### Personalize your gift

You can include a personal message with your gift and earmark it for specific funds.



It was easy to use and understand, quick and simple. Saves so much time and worry by asking you the important questions as you go along. This site is great.

— Stock donor



Very easy to use. They guide you through the whole process, step by step! Would definitely recommend.

— Stock donor

## About FreeWill

FreeWill is one of the fastest growing charitable giving platforms in the world. Today, 1200+ nonprofits raise more than \$10M per day using FreeWill's tools.

Increasingly many of ACME's donors are turning to stock donations to support the mission, but are unsure of how to get started. FreeWill makes it simple and secure for supporters to find and complete the necessary forms to support charities with their stock and other securities.



# Stock Gifts with FreeWill

Three options to proceed:

1. Give stock online
2. Access your nonprofit's transfer information to give the traditional way
3. Give stock on behalf of a client (financial advisors)

The screenshot shows the FreeWill website interface. At the top right, there is a pink button labeled "Donate stock". The main content area features the heading "Maximize your impact" and a sub-heading "3 easy ways to give securities". Below this, there are three options, each with an icon and a button:

- Make a gift of stock online**: Accompanied by a green icon of a document with a checkmark. The text states: "You can complete your gift and support our mission in as little as ten minutes. FreeWill's free online tool walks you through the process step-by-step." A pink button labeled "Make a gift of stock online" is shown with a red arrow pointing to it.
- Make your gift over the phone, by mail or via a financial advisor**: Accompanied by an orange icon of a document with a checkmark. The text states: "If you've donated stock previously and are familiar with the process, access ACME's brokerage and DTC information." A pink button labeled "Access transfer information" is shown with a red arrow pointing to it.
- Start gift as a financial advisor**: Accompanied by a blue icon of a shield with a checkmark. The text asks: "Are you a financial advisor working on behalf of your philanthropic client? Use this tool to request a securities transfer on behalf of your clients." A pink button labeled "Start gift as a financial advisor" is shown with a red arrow pointing to it.

At the bottom of the modal window, the text "How it works" is visible. The background of the website shows a blurred image of a waterfall in a forest.

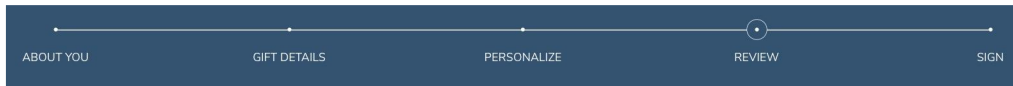


# Stock Gifts with FreeWill

Helpful features:

Some brokers allow e-signature – we facilitate this through DocuSign

For those that don't allow e-signature, or for donors who prefer to complete the process the traditional way, the forms are available for download



## Review your gift details

FreeWill uses DocuSign to allow you to securely input your information and sign your documents electronically. You will not be able to edit your documents once the DocuSign process is completed.

### Your information

LaurenTEST Winther-HansenTEST  
lwinther-hansen@freewill.com  
(202) 555-1212

123 Test St,  
Annapolis, MD 21401

[Edit](#)

### Designation

ACME

[Edit](#)

### Message

[Edit](#)

SECURITY	CURRENT VALUE
SBUX	\$20256.00
200 shares	<a href="#">Edit</a> <a href="#">Delete</a>

[+ Add stock, bond, mutual fund or other security](#)

By clicking "Complete with DocuSign" below, you agree that this document will be mailed on your behalf on completion of the signing process with the third-party service known as DocuSign. You agree that the electronic signature appearing on the document is the same as a handwritten signature for the purposes of validity, enforceability, and admissibility.

Prefer to print and mail the forms yourself? [Download pre-filled forms](#)

Previous

Complete with DocuSign

# Stock Gifts with FreeWill

Upon completion:

1. PDF document with a cover page of instructions to finish the process



## Thanks for using FreeWill! You're almost done!

---

### Read

- Read your charitable stock gift form carefully and make sure you understand everything.
- This form is only for a charitable stock gift. For donations to the Schwab Charitable Fund, please use the form available at [www.schwabcharitable.org](http://www.schwabcharitable.org).
- If there's anything you feel like you don't understand, please call Charles Schwab at: 800-435-4000.

---

### Fill

- Use a black ink pen.
- In section 1, fill in your account number.
- In the attached letter of instructions, fill in your account number.

---

### Sign

- Sign and date the form in section 4. If there is a co-owner on the account, please have him or her sign and date as well.
- Sign and date the attached letter of instructions to ensure you receive acknowledgement of your gift for your tax records. If there is a co-owner to the account, please have him or her sign and date as well.





# Stock Gifts with FreeWill

Upon completion:

1. PDF document with a cover page of instructions to finish the process
2. Pre-populated gift form – note that we don't collect account numbers or other sensitive info



## Charitable Gift Transfer Letter of Authorization

CLEAR

PRINT

Page 1 of 2

- Complete, sign, and fax to: 1-877-824-3726, Attention: Outgoing Transfers. Clients of investment advisors: Please return this form to your advisor.
- Use this form to make charitable gift donations by transferring stocks, bonds, and/or mutual funds from your Schwab account to an individual or charitable organization account held at another financial institution.
- For donations to a Schwab Charitable™ account, please use the Contribute to Your Donor-Advised Fund Account form located on the Resources tab at [www.schwabcharitable.org](http://www.schwabcharitable.org).

### 1. Schwab Account Information

Schwab Account Number LaurenTEST Winther-HansenTEST  
Account Title/Registration

### 2. Securities to Be Transferred

For each security listed, indicate either Purchase Date and Cost Per Share or Alternate Accounting Method.

#### Starbucks Corp.

Name of Stock/Bond/Mutual Fund

SBUX 50  
Symbol/Ticker/CUSIP Number of Shares to Be Transferred\*  
2009-07-10 1750.00  
Purchase Date (Optional) Cost Per Share (Optional)

OR

Alternate Accounting Method (Please indicate: FIFO, LIFO, Low-Cost, or High-Cost)

Name of Stock/Bond/Mutual Fund

Symbol/Ticker/CUSIP Number of Shares to Be Transferred\*  
Purchase Date (Optional) Cost Per Share (Optional)

OR

Alternate Accounting Method (Please indicate: FIFO, LIFO, Low-Cost, or High-Cost)



# Stock Gifts with FreeWill

Upon completion:

1. PDF document with a cover page of instructions to finish the process
2. Pre-populated gift form – note that we don't collect account numbers or other sensitive info
3. Cover letter to include with the gift form, asking that they be identified as the donor of record

Charles Schwab  
Charles Schwab & Co., Inc.  
1958 Summit Park Dr., Ste. 200  
Orlando, FL 32810

08/01/2023

Re: Request for Charitable Stock Donation from Stock Brokerage Account

To whom it may concern,

I have attached the required form to request a charitable stock gift from my stock brokerage account.

In your transmittal to ACME, Inc., please state my name, email and address as the donor of record in connection with this transfer. Please also specify that I would like this gift to be used in support of: Area of Greatest Need.

Please send the full list of stocks listed below:

Stock Name: Starbucks Corp.  
Ticker Symbol: SBUX  
Number of Shares: 200

Please send the stocks listed from my account to:

ACME, Inc.  
EIN: 12-1234567  
Attention: Tweety Bird  
Account Number: 123456  
DTC number: 0226

I kindly ask that you waive any stock transfer fees for this request. It is my intention to have this transfer qualify during the 2023 tax year. Therefore, please send this distribution as soon as possible, postmarked no later than December 31, 2023.

If you have any questions or concerns regarding this request, I can be reached at (202) 555-1212 and lwinther-hansen@freewill.com.

Thank you for your assistance.

Sincerely,

LaurenTEST Winther-HansenTEST

Date:

Account Number:



# Stock liquidation

This is an optional feature of the stock product

1. Ensures you don't miss out just because you don't have the staff or the brokerage in place to process stock gifts
2. Eliminates time spent triaging across your finance department, development department, and brokerage firm, just to reconcile and accept a gift
3. Streamlines internal processes and adds overall clarity when accepting stock gifts



## Make it easy for your supporters

Donors use the intuitive FreeWill Stock Tool to gift their appreciated asset, often deriving great tax benefits in doing so.

## Liquidate automatically

FreeWill's affiliated non-profit, FreeWill Impact Fund, immediately liquidates the gift, so you can receive the net cash proceeds. No middleman needed.



## Improve visibility

Status of the stock gift, as well as gift-to-donor matching information, are available in FreeWill's Portal.

## Close the loop

Donors automatically receive tax acknowledgment letters from FreeWill Impact Fund to allow them to receive a tax benefit.



# Demo time!

[freewill.com/stocks/happypaws](https://freewill.com/stocks/happypaws)



# Donor Advised Funds with FreeWill



# Donor Advised Funds with FreeWill

## Helpful features:

- Customizations let visitors know they landed in the right place
- A user-friendly, single-flow experience, not unlike PayPal or Venmo
- Seamless compatibility with top DAF custodians
- Exceedingly quick and easy to use



## Start a grant from your donor-advised fund (DAF)

Use the form below to provide details about your intended grant to University Stock-Test from your donor-advised fund. This information makes it easier to locate your gift when it arrives, thank you for your support, and ensure your gift goes to the right place.

Upon submission of this form, you'll be redirected to your DAF sponsor's website to finish the granting process.

How much will you grant to University Stock-Test?

\$

Which organization do you intend for your gift to go to?

Custom Fund	College of Allied Health Sciences	McMicken College of Arts & Sciences	Clermont College
College of Music	Columbia College Foundation		

Use this space below to leave a message to University Stock-Test (optional):

You can use this space to leave a message.



# Donor Advised Funds with FreeWill

What is your name?

Jane Mary Doe

Preferred name (Optional)

What is your email address?

jane@example.com

What is your phone number?

Sharing your phone number allows Acme to contact you. (Optional)

(201) 555-5555

This tool is powered by [FreeWill](#) and [Chariot](#). We will store your name, phone number, email, address, and other information. If you are not a donor, we will not share your information with any other organization. If you are a donor, we will share your information with the appropriate organization. If you are a donor, we will share your information with the appropriate organization. If you are a donor, we will share your information with the appropriate organization.

By checking this box, I confirm that I agree to the [Terms of Service](#) and [Privacy Notice](#).

[I don't have a Donor Advised Fund](#)

[Continue](#)

By selecting "Continue" you agree to our [Terms of Service](#) and [Privacy Policy](#) for account linking.

[Connect donor-advised fund](#)

Powered by: **FREEWILL**



# Donor Advised Funds with FreeWill

What is your name?

Jane Mary Doe

Preferred name (Optional)

What is your email address?

jane@example.com

What is your phone number?

Sharing your phone number allows A

(201) 555-5555

This tool is powered by [FreeWill](#) and [Chariot](#). Your name, phone number, email, address, and other information is automatically recorded, FreeWill will share the information with the DAF Provider you select. By checking this box, I confirm that I have read and agree to FreeWill's [Terms of Service](#) & [Privacy Notice](#).

By checking this box, I confirm that I have read and agree to FreeWill's [Terms of Service](#) & [Privacy Notice](#).







[Connect donor-advised fund](#)

Powered by: [FREEWILL](#)

← Chariot ×

Select your DAF Provider

Search

-  Schwab Charitable
-  Charityvest
-  National Philanthropic Trust
-  Fidelity Charitable
-  Chicago Community Trust
-  Goldman Sachs Philanthropy Fund





# Donor Advised Funds with FreeWill

The image shows a registration form for Donor Advised Funds with a Fidelity Charitable login overlay. The form fields include:

- What is your name? (Jane, Mary, Doe)
- Preferred name (Optional)
- What is your email address? (jane@example.com)
- What is your phone number? (201) 555-5555

The Fidelity Charitable overlay contains the following text and elements:

- FIDELITY Charitable\*
- Login to your account
- Securely connect your Donor Advised Fund account with Chariot.
- Username field
- Password field
- Continue button
- Reset your password link
- How does Chariot work? link

At the bottom of the form, there is a checkbox and text:  By checking this box, I confirm that I have read and agree to FreeWill's [Terms of Service](#) & [Privacy Notice](#).

A button at the bottom right says "Connect donor-advised fund".

At the bottom of the page, it says "Powered by: FREEWILL" with a feather logo.



# Donor Advised Funds with FreeWill

The image shows a registration form for Donor Advised Funds with a Fidelity Charitable login overlay. The form fields include:

- What is your name? (Jane, Mary, Doe)
- Preferred name (Optional)
- What is your email address? (jane@example.com)
- What is your phone number? (201) 555-5555

The Fidelity Charitable login overlay contains the following text:

- FIDELITY Charitable\***
- Login to your account**
- Securely connect your Donor Advised Fund account with Chariot.
- Username: good-user
- Password: .....
- Continue** button
- [Reset your password](#)
- How does Chariot work?

At the bottom of the form, there is a checkbox for terms and conditions:

By checking this box, I confirm that I have read and agree to FreeWill's [Terms of Service](#) & [Privacy Notice](#).

A button at the bottom right says "Connect donor-advised fund".

At the bottom of the page, it says "Powered by: **FREEWILL**" with a feather logo.



# Donor Advised Funds with FreeWill

What is your name?

Jane Mary Doe

Preferred name (Optional)

What is your email address?

jane@example.com

What is your phone number?

(201) 555-5555

Sharing your phone number allows Acme to thank you.

This tool is powered by [FreeWill](#) and [Chariot](#). If your name, phone number, email, address, and other information is not accurately recorded, FreeWill will share the information with Acme.


By checking this box, I confirm that I have read and agree to FreeWill's [Terms of Service](#) and [Privacy Notice](#).

By clicking "Continue", you certify that you have read & understood [Donor Advised Fund Terms & Services](#).

[Connect donor-advised fund](#)

Powered by: [FREEWILL](#)

**Chariot** ✕



Acme

Example Account Na... \$10,000.00 ▾

\$50 USD

Boost your donation!

+100 +250 +500 +1,000

Continue



# Donor Advised Funds with FreeWill

The screenshot shows a web form for connecting a donor-advised fund. The form is partially obscured by a white modal dialog box. The form fields include:

- What is your name? (Jane, Mary, Doe)
- Preferred name (Optional)
- What is your email address? (jane@example.com)
- What is your phone number? (201) 555-5555

Below the form, there is a checkbox with the text: "By checking this box, I confirm that I have read and agree to FreeWill's Terms of Service & Privacy Notice." A blue button labeled "Connect donor-advised fund" is at the bottom right.

The modal dialog box in the foreground contains the text: "Establishing secure connection" and a close button (X).

At the bottom right of the page, it says: "Powered by: **FREEWILL**" with a feather logo.



# Donor Advised Funds with FreeWill

The image shows a registration form for Donor Advised Funds on the FreeWill platform. The form is partially obscured by a white modal window. The form fields include:

- What is your name? (Jane, Mary, Doe)
- Preferred name (Optional)
- What is your email address? (jane@example.com)
- What is your phone number? (201) 555-5555

Below the form, there is a checkbox with the text: "By checking this box, I confirm that I have read and agree to FreeWill's Terms of Service & Privacy Notice." The checkbox is checked.

A dark blue button at the bottom right of the form reads "Connect donor-advised fund".

The modal window in the center is white with a close button (X) in the top right corner and contains the text "Authenticating credentials".

At the bottom right of the page, it says "Powered by: FREEWILL" with the FreeWill logo.



# Donor Advised Funds with FreeWill



## Thank you for your support.

Your grant request in support of Acme has successfully been made. You will be emailed a receipt from Charityvest once the grant is complete.

A copy of this information has been saved to your FreeWill account under the email jane@example.com.  
You can [log into your account](#) at any time.

Start another grant



# Demo time!

[freewill.com/daf/happypaws](https://freewill.com/daf/happypaws)

Use these credentials:  
good-user | password123



# Crypto Gifts with FreeWill





# Crypto Gifts with FreeWill

Helpful features:

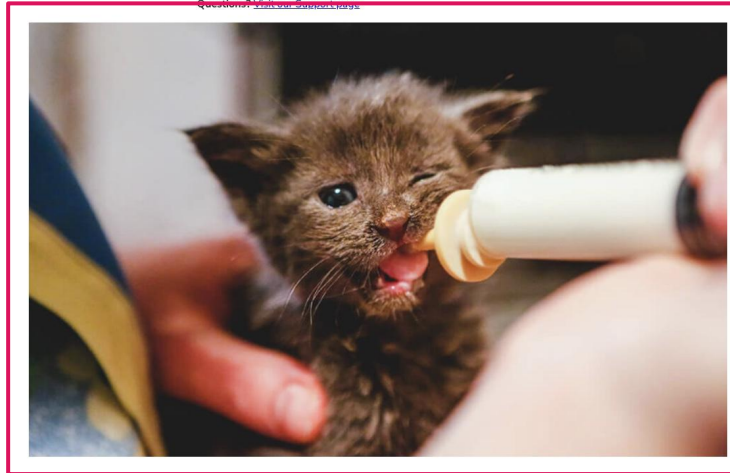
1. Customizations let visitors know they landed in the right place
2. The user fills in the short form, clicks continue, and receives a one-time wallet address to which to send their crypto
3. An exceedingly quick and easy user experience

Donating cryptocurrency is safe, easy, and tax-efficient.



Thank you for your crypto donation in support of Happy Paws. Please use the form to make your gift.

A receipt will be sent to the provided email address and providing your contact details helps us tremendously to understand who our donors are. Your personal information is never shared, sold, or traded. Your donation does not trigger capital-gains tax and may be tax-deductible.



**Happy Paws**  
EIN: 00-000001

1 Details 2 Send

Choose a coin \*

Coin amount \*  
0

See here for more info on the coins/tokens we accept. Approx. \$0.00 USD

Donor name/pseudonym \*

Email address \*

Mailing address \*  
e.g. 1234 Main Street, Apt 1A, New York, NY, 10036

Phone Number \*

Message to nonprofit (e.g. area of intent)

Continue



# Demo time!

[cryptoforcharity.io/happypaws](https://cryptoforcharity.io/happypaws)



# 04 Next steps



## LOOKING AHEAD:

# Next steps

1. Complete the [post-training survey](#)
2. Use the links shared throughout this presentation to test the user experience for yourself
3. Bookmark your nonprofit's smart giving landing page so you can find it easily (Note: all your custom pages are linked on the homepage of Portal)
4. Draft and practice your talking points so you can confidently encourage donors to use your smart giving tools



# Thank you!

**Lauren Winther-Hansen**  
Nonprofit Training Lead

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

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