# 2024

# Planned Giving Report

An in-depth look at the biggest trends in estate planning and legacy giving



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# Introduction

### Introduction

Dear friends,

It's an exciting time in the world of philanthropy, and planned giving is no exception. At FreeWill, we believe that planned giving has truly come into its own, and each day we gain deeper insights into the modern planned giving donor.

This past year, Americans from all walks of life turned to FreeWill to create their estate plans for free. Our youngest user was just 18, while our oldest user was 100 — but the median will-maker and planned giving donor was 55 years old. Over a quarter million estate plans were completed through our platform in the last year alone, with nearly 40,000 individuals choosing to include a planned gift in their wills.

In that same period, \$1.8 billion was committed to charity, helping FreeWill surpass \$10 billion in planned gift commitments since our founding in 2017.

As the Great Wealth Transfer gets underway, we anticipate that planned giving will only continue to make up a bigger piece of nonprofit funding, with Baby Boomers—the wealthiest generation in history—approaching life expectancy.

We've also been following broader fundraising trends, such as Giving USA's finding that <u>bequests</u>

were the only source of funding to outpace inflation in 2023, and CCS Fundraising's statistic that nonprofits with at least one dedicated planned giving staff member raised 300% more than those without. These insights underscore the growing importance of legacy giving within the philanthropic sector.

We're excited to share this year's findings into the planned giving trends we've observed. Whether your organization is just starting out with planned giving or has a well-established program already in place, we hope this data proves valuable to you as you continue to build and refine your strategy.

This is an inspiring moment for planned giving, and we're grateful that FreeWill has been part of its growing impact and success. Thank you for being on this journey with us.

Sincerely,
Patrick Schmitt & Jenny Xia Spradling
Co-CEOs, FreeWill
August 2024





# About this report

# About this report

This report is an analysis of estate plans and charitable bequests made through FreeWill's platform from June 2023 through May 2024.

During this time, FreeWill users completed 237,874 free, valid legal wills and trusts, or documented their wishes to be finalized by an attorney.

In the will-making process, nearly 40,000 individuals committed a planned gift to charity, which amounted to 16% of all FreeWill users opting to make a bequest commitment to a nonprofit, or nonprofits, of their choice.

The total estimated value of these bequests is **over \$1.8** billion.

In order to create this report, we review anonymized demographic, financial, and philanthropic data from our users to present an up-to-date picture of the modern will-maker and legacy donor.

We use the term "will-maker" synonymously for FreeWill users who complete either a last will and

testament or revocable living trust. We also use the term "charitable bequests" synonymously for charitable bequest commitments in a will and distributions to charity in a revocable living trust.

Across these factors, we look at several different variables, including:

- 1. The total number of estate plans made;
- 2. The percent of will-makers who included a charitable bequest; and
- 3. The expected value of those bequests.

As with our previous reports, we have included our biggest takeaways from this batch of data to help inform the planned giving strategy of your nonprofit organization.

# 1M wills created

# 1M wills created



"Grateful as a single mom – Easy and exactly what I needed as a single mom on a budget but wanting to make sure my kids are safe."

by customer

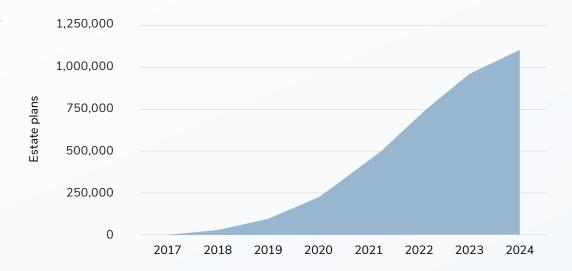


In 2024, FreeWill reached an exciting milestone: helping 1 million individuals create their estate plans online for free, solidifying our position as the largest provider of online estate planning in the United States.

Since 2017, FreeWill has offered a free, public platform to anyone in the U.S. seeking to create an estate plan. In addition, we partner with over 1,500 nonprofit organizations to extend free access to our estate planning tools, empowering individuals to leave a lasting impact through charitable giving.

Thanks to our public platform and incredible nonprofit partners, FreeWill has helped drive over \$10 billion to charity through legacy gifts, making a profound difference in communities across the country.

### NUMBER OF ESTATE PLANS CREATED ON FREEWILL BY YEAR



# Key findings

# **Key findings**

### 1. Gen Z donors are increasingly philanthropic.

Young people are not only proactive about estate planning, but they are also demonstrating a growing commitment to charitable giving. In fact, 21% of estate plans created by users 18-24 included a bequest. The average bequest size from donors aged 18-24 increased by 23% from 2023, reaching \$34,798.

# 2. Middle-aged Americans are increasingly engaging in estate planning.

Though adults aged 45-64 make up only 25% of the population, they represent 38% of will-makers on our platform. This age group is a strong prospect for planned giving, as their wealth is likely to grow—both through proactive estate planning and as the younger segment begins to benefit from the Great Wealth Transfer.

### 3. Women continue to lead in planned giving.

Women, regardless of marital status, make the most wills and bequests. Nearly 60% (58%) of all bequests were from women. Single females also saw a slight bump in dollars allocated to charity for a second straight year of growth.

58%

of all bequests were from women





# 1.8x

larger gifts are given by single individuals compared to married individuals

# 4. Single individuals tend to give bigger gifts than married users.

On average, single individuals give 1.8 times larger gifts than married individuals, making them a critical segment to consider in planned giving and fundraising efforts. This group may feel a stronger inclination to leave a lasting impact through their philanthropy, underscoring their importance in charitable planning.

# 5. Two-thirds of planned giving donors choose to share their information with nonprofits.

The oldest and youngest donors are the groups most likely to share their contact information with nonprofits they've included in their estate plans. Over 70% of donors in their twenties and thirties agree to share their information with nonprofits while 80% of donors in their nineties do the same.



# Overview: Planned giving in 2024

# Overview: Planned giving in 2024

Over the past year, 237,874 estate plans were completed, with 16% of these plans including charitable bequests.

Still, planned giving reflected broader trends in charitable giving, demonstrating a decline in the total amount raised. Specifically, \$1.8 billion was raised in bequests during this period, a 22% decrease compared to the previous year.

To help will-makers create more comprehensive estate plans, we've introduced a feature allowing users to list all of their assets, both probate and non-probate. Probate assets are those that go through the court-supervised process of distribution—such as real estate or personal possessions held solely in the deceased's name. Non-probate assets, on the other hand, pass directly to beneficiaries without the need for court intervention; examples include life insurance policies, retirement accounts, and jointly-owned properties. More than 67K will makers utilized this feature, making their wills more comprehensive by including over 377K assets.



### Key takeaway

81% of will-makers chose to include both probate and non-probate assets, resulting in more comprehensive estate plans

16%

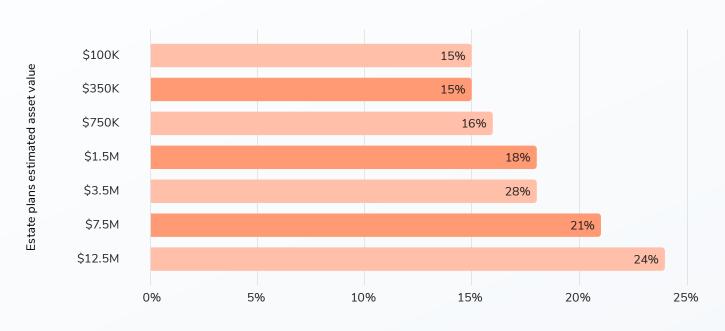
of estate plans included a gift to charity

# 81%

of will-makers used the assetlisting feature to include both probate and non-probate assets

PERCENT OF ESTATE PLANS WITH CHARITABLE BEQUESTS BY MEDIAN ESTATE SIZE Among the most commonly listed assets were financial accounts (98K) and vehicles (70K). Notably, 81% of these will makers included both probate and non-probate assets in their estate plans, indicating the feature's effectiveness in helping individuals thoroughly document their assets.

Similar to 2023, individuals with estate sizes ranging from \$100K to \$12.5M utilized FreeWill to complete their estate plans. While the percentage of bequests committed by those in lower asset ranges remained steady compared to last year, higher asset groups experienced a slight uptick in their share of bequests. Notably, estates in the \$3.5M range saw the largest increase, rising from 20% in 2023 to 28% in 2024.



% with Bequest

# Age

21%

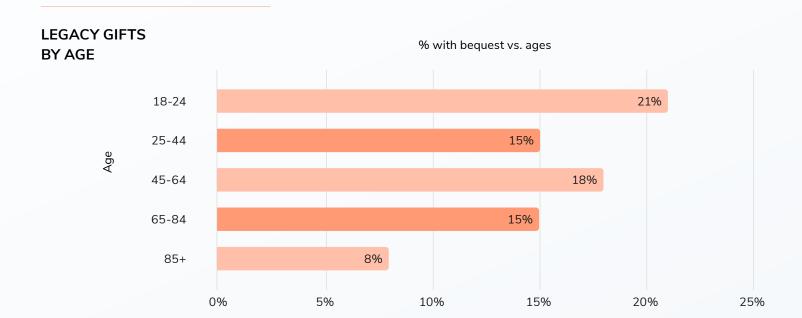
of will–makers aged 18 to 24 included a bequest in their will

### Age & estate planning

It's a common misconception that only older adults need to create an estate plan, but every adult, regardless of age, should have a will to protect their legacy and loved ones. Unfortunately, nearly 70% of Americans do not have an up to date will, an issue that impacts every age demographic.

Through FreeWill, we've seen that Americans of all ages are turning to online solutions to address their estate planning needs. The same goes for individuals choosing to engage in legacy giving.

Younger will-makers continue to be the cohort most likely to include a bequest. 21% of will-makers aged 18 to 24 included a bequest in their will. They were also the only group whose average gift size increased from the previous year (+23%) to \$34,798.



~20%

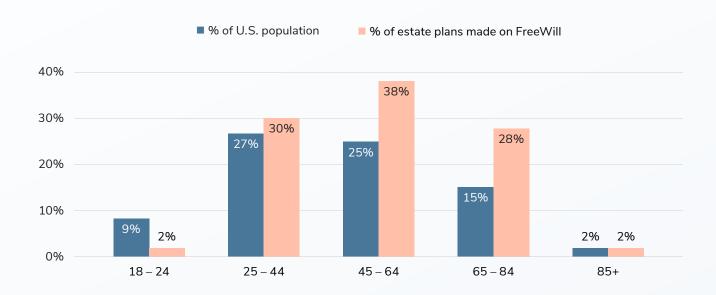
of will-makers 45 to 64 chose to include a bequest

Nearly 20% of will-makers 45 to 64 chose to include a bequest, while 15% of those aged 25 to 44 and 65 to 84 chose to do so.

Less than 10% of will-makers 85 and older included a bequest, but continue to give the largest bequest size on average out of all ages, amounting to \$59,480. They were closely followed by 65 to 84 year olds whose average bequest amounted to \$55,806.

FreeWill users more commonly choose to leave a percentage of their estate to charity than a specific dollar amount during the will-making process.

## SHARE OF US POPULATION & ESTATE PLANS BY AGE

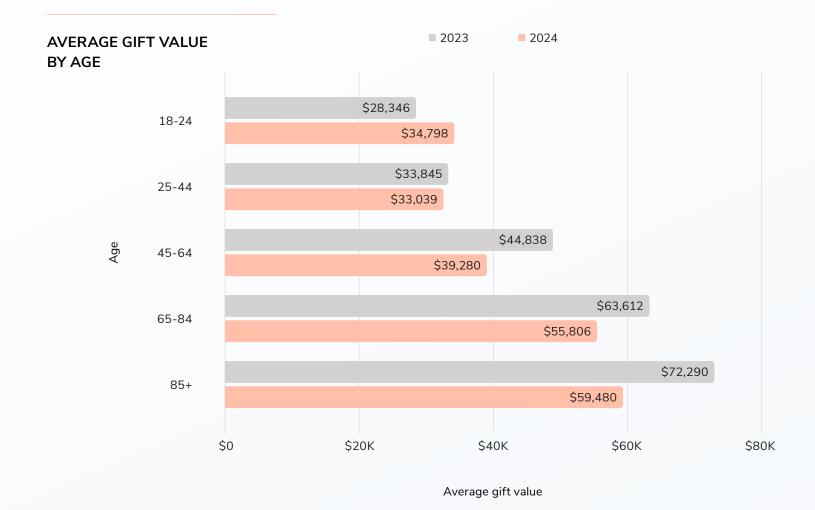


\$59,480

was the largest average gift value among all age groups

Interestingly, this year younger donors (18 to 24) were the only group whose average bequest size increased from the previous year. This could be due to a combination of greater financial awareness and a stronger propensity to give among Gen Z.

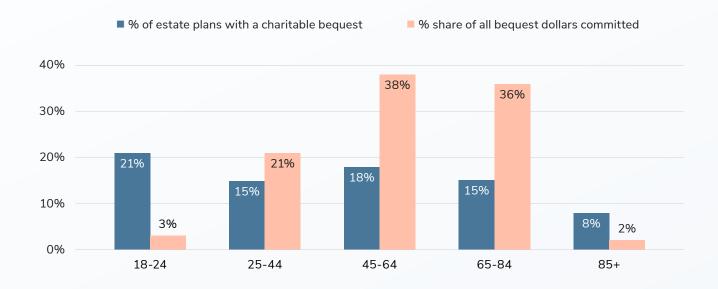
The increase in gift size means that each age group, on average, committed a bequest of over \$30,000 to charity.



60%

of donors across all age groups decided to share their information with nonprofit organizations when leaving a gift Similar with last year, over 60% of donors across all age groups decided to share their information with nonprofit organizations when leaving a gift.

# CHARITABLE BEQUESTS BY AGE

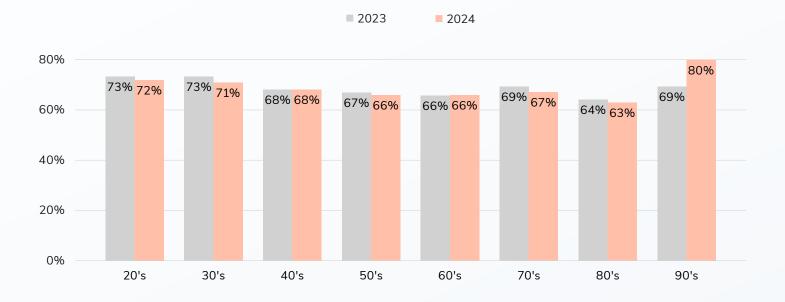


80%

of donors in their nineties shared their information in 2024

Sharing rates across each decade remained relatively steady, with one notable exception: donors in their nineties. This group saw a significant increase in sharing rates for the second consecutive year, rising from 52% in 2022 to 69% in 2023, and reaching 80% in 2024.

# % SHARING INFO BY AGE



### Gender

of estate plans were written by women



### Key takeaway

Women, regardless of marital status, make the most wills and bequests. Nearly 60% (58%) of all bequests were from women. Single females also saw a slight bump in dollars allocated to charity for a second straight year of growth.

### Gender & estate planning

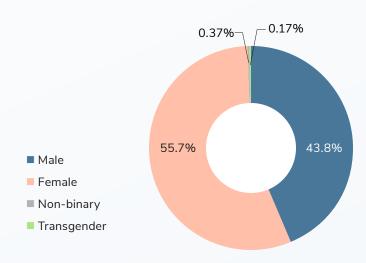
Consistent with previous report findings, women outrank men both in terms of estate planning and legacy giving.

56% of estate plans were written by women compared to 44% written by men. Although a smaller percentage, individuals who identified as transgender or non-binary comprised just 1% of all will-makers and made up 1% of all total bequest dollars committed.

Women created nearly 60% of all bequests last year but only 51% in dollars committed. The average bequest committed by a female will-maker was \$47,434.

Men created 40% of bequests, and 48% of all dollars committed due to a higher average gift size of \$62,426.

#### **GENDER OF WILL-MAKERS**



GENDER	AVERAGE GIFT VALUE
Male	\$62,426
Female	\$47,434
Non-binary	\$70,234
Transgender	\$40,223

Transgender and non-binary individuals, while making up a much smaller percentage of overall will-makers, had nearly double the rate of wills that included bequests compared to male and female will-makers.

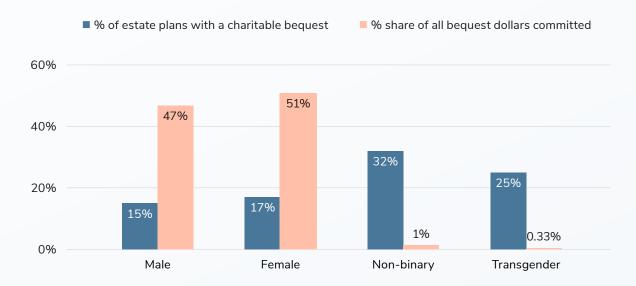
The number of wills with bequests created by transgender and non-binary users amounted to 32% of all wills created by this group, compared to just 15% for wills created by men and 17% for wills created by women.

Additionally, the average bequest size committed by non-binary users increased by 76% to \$70,234 in 2024 up from \$39,865 in 2023.

The average gift size by transgender users rose by 58% from \$25,384 in 2023 to \$40,223 in 2024.

Average bequest size decreased for both males and females by 12% and 5%, respectively.

### CHARITABLE BEQUESTS BY GENDER



# Family and estate planning

### Family and estate planning

Will creation by married users slightly increased for the third year in a row comprising 60% of all wills created compared to 58% last year. Conversely, single users made up 2% fewer wills created and represented 37% of all wills created.

In fact, 85% of will-makers had a spouse, children, or both, which is consistent with last year's findings. 75% indicated they have children and 60% said they were married.

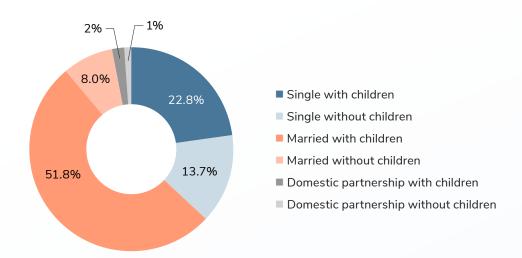
Married users with children saw a 3% increase in their share of wills and number of bequests committed to charity compared to last year, combating a common assumption that parents are less inclined to include a charity in their estate plans.

Single users without children saw a 4% increase in their share of dollars raised compared to last year. Despite making up only 14% of all will-makers, they made up nearly half of all bequest dollars committed. This group experienced a slight decline in will-creation and charitable giving, but those who are choosing to give gave larger gifts. Their average bequest size increased by 5% to \$74,127 while average bequest size among all other groups decreased.

85%

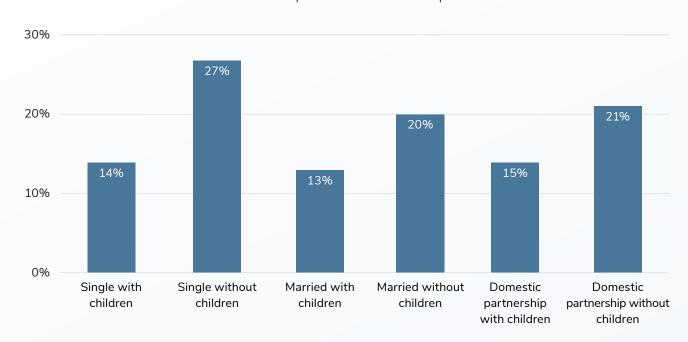
of will-makers had spouses, children, or both





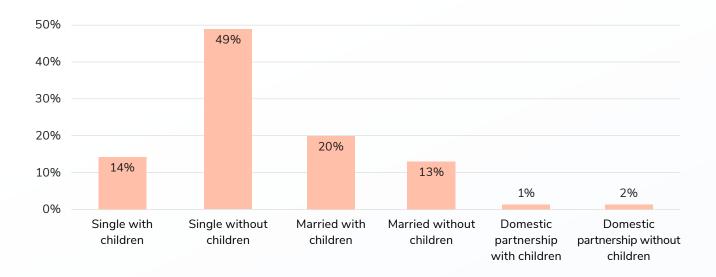
# CHARITABLE BEQUESTS BY FAMILY RELATIONSHIP

■ % of estate plans with a charitable bequest

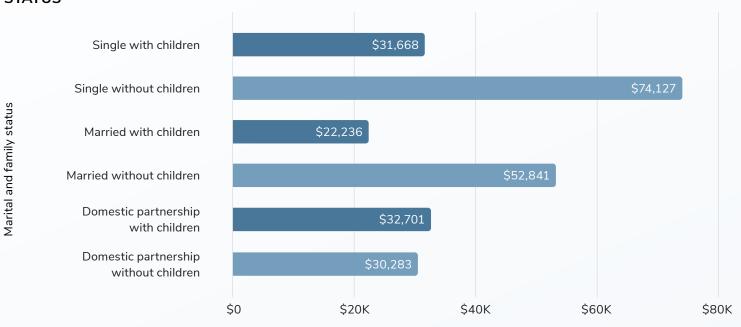


### SHARE OF ALL BEQUEST DOLLARS COMMITTED BY FAMILY RELATIONSHIP

■ % share of all bequest dollars committed



### AVERAGE GIFT VALUE BY MARITAL AND FAMILY STATUS



Average gift value

# Marital status and estate planning

46%

of wills including a bequest were made by single users



#### Key takeaway

On average, single individuals give 1.8 times larger gifts than married individuals, making them a critical segment to consider in planned giving and fundraising efforts. This group may feel a stronger inclination to leave a lasting impact through their philanthropy, underscoring their importance in charitable planning.

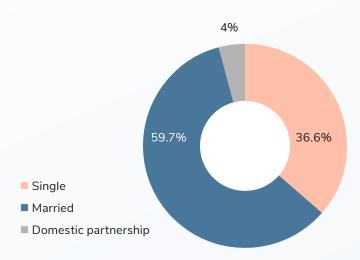
### Marital status and estate planning

Will creation was more prevalent among married users than single users. In fact, 60% of will-makers using FreeWill reported being married, compared to 37% who identified as single, while 4% indicated they were in a domestic partnership.

When looking specifically at estate plans that included a bequest, the distribution between married and single will-makers was more balanced. Single users accounted for 46% of wills with a bequest, married users created 50%, and the remaining 4% were created by those in a domestic partnership.

Among single will-makers, women continue to surpass men in the number of wills created, the number of charitable bequests, and the total dollars

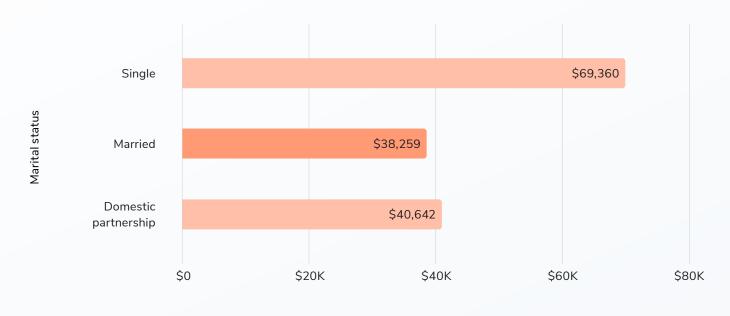
### MARITAL STATUS OF WILL-MAKERS



allocated to charity. While there was a slight decrease in the number of wills created and bequests compared to last year, bringing levels back to those seen in 2022, there was a modest increase in the total dollars committed to charity. This amount rose from 31% last year, marking the second consecutive year of growth in charitable contributions by single women.

Average gift size increased for users who identified as single and those in a domestic partnership while it decreased for married users. In fact, the average gift size for single users was \$69,360 - 1.8\$ times greater than married users.

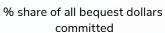
### AVERAGE GIFT VALUE BY MARITAL STATUS

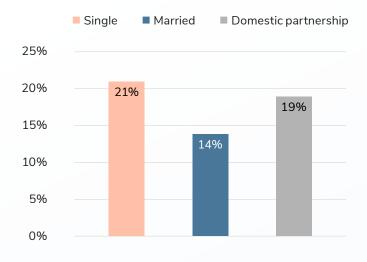


Average gift value

### CHARITABLE BEQUESTS BY MARITAL STATUS

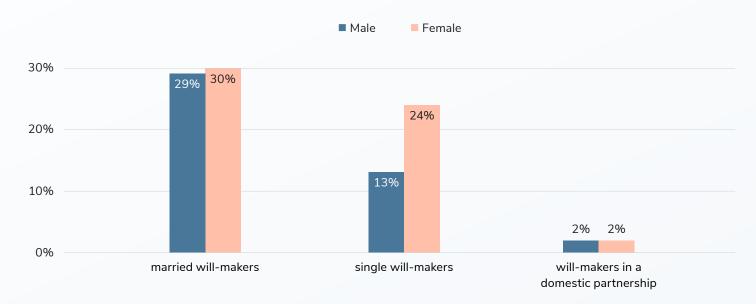






% of estate plans with a charitable bequest

# MARITAL STATUS OF WILL-MAKERS BY GENDER



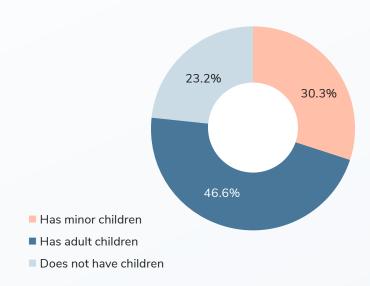
# Parenthood and estate planning

# Parenthood and estate planning

Creating an estate plan is an important step to take for anyone, but especially for parents of children under 18. It ensures children have a designated guardian and assets have been set aside for their care in the event that something happens.

Generally, estate planning habits by parents and non-parents remained generally consistent with the previous two years findings.

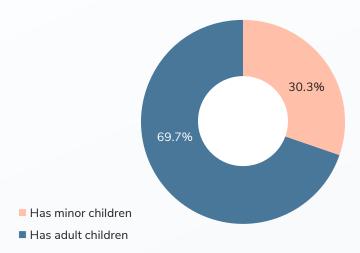
#### **PARENTAL STATUS**



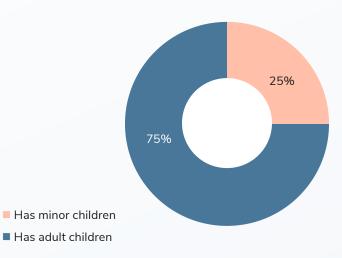
Over three-quarters of all will-makers using FreeWill were parents, and surprisingly, the majority had adult children. In fact, 70% of parents reported having adult children, while only 30% were parents to young children.

This trend is also reflected in wills with bequests, as parents of adult children made up 75% of all wills with charitable bequests, compared to just 25% created by parents of young children. As their children become adults, parents may feel less inclined to allocate as much of their estate to their children, which could explain the higher prevalence of charitable bequests among this group.





## WILLS WITH BEQUESTS BY PARENTAL STATUS

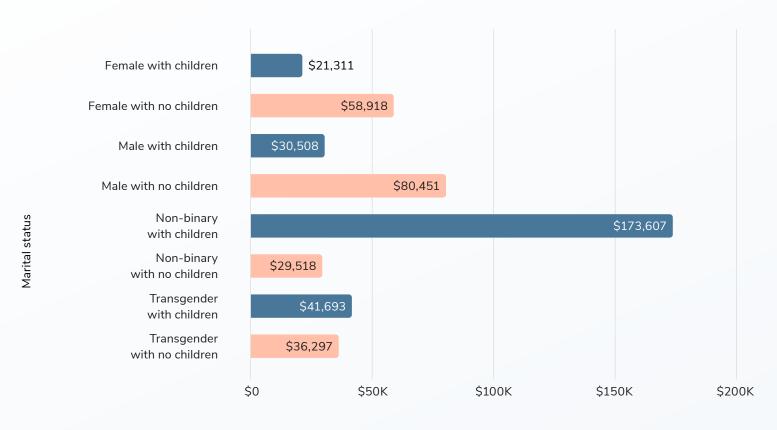


PARENTAL STATUS	AVERAGE GIFT VALUE
No children	\$66,449
Has any children	\$25,600
Has minor children	\$23,710
Has adult children	\$47,605

Users with children of all ages represent 65% of bequests committed, up from 57% last year demonstrating a possible increase in charitable intent among this group.

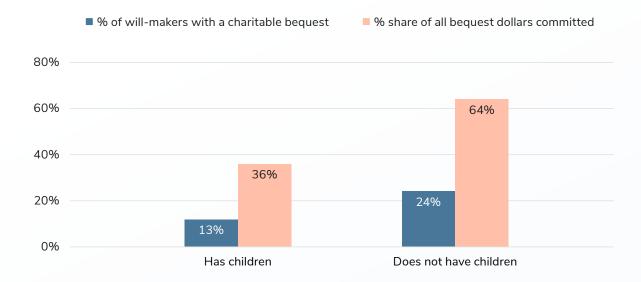
Average bequest sizes declined across all groups, but users with adult children committed gifts that were twice as large as users with minor children amounting to \$47,605.

# AVERAGE GIFT VALUE BY PARENTAL STATUS

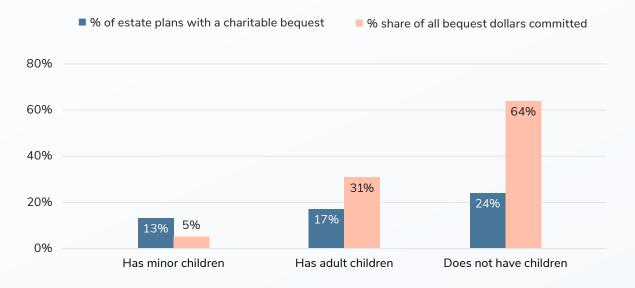


Average gift value

# CHARITABLE BEQUESTS BY PARENTAL STATUS



# CHARITABLE BEQUESTS BY PARENTAL STATUS [MINOR VERSUS ADULT]



# The most generous states

### Geography and estate planning

Americans from all fifty states used FreeWill to complete their estate plans, and we saw legacy gifts being committed by individuals across the entire country. Although certain states experienced higher levels of giving than others.

For the third year in a row, Washington DC had the highest giving rates. 28% of estate plans made by individuals living in Washington DC included a gift to charity.

Hawaii rose to second place this year, up from fourth, with 22% of wills including a charitable bequest. Montana, which was previously ranked 17th, jumped up to third for rate of giving. Connecticut and Oregon remained in fourth and fifth place for the second year in a row.



#### Key takeaway

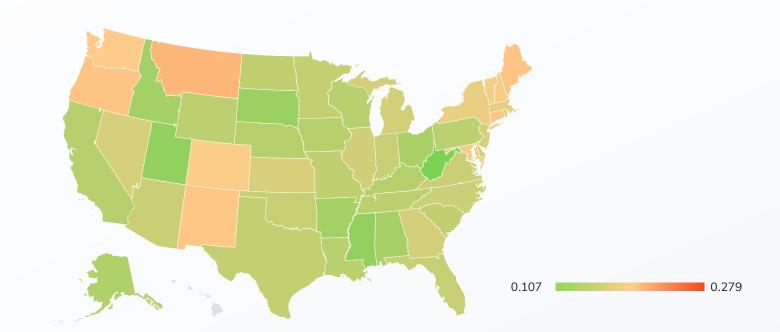
Washington, DC continues to be the top location for generous will-makers. 28% of estate plans made by individuals living in the U.S. capital included a gift to charity.

28%

of estate plans made by residents of Washington, DC included a gift to charity

RANK OF GIVING	2024 2023	
1	Washington DC	Washington DC
2	Hawaii	New Mexico
3	Montana	Massachusetts
4	Connecticut	Connecticut
5	Oregon	Oregon

# SHARE OF ESTATE PLANS WITH BEQUESTS



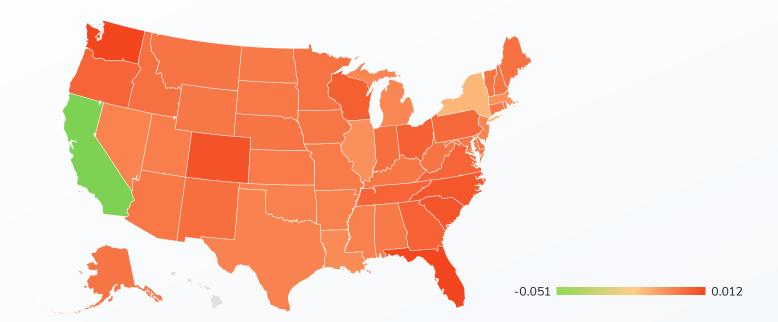
When looking at which states had the greatest share of wills created proportional to population, Florida ranked first for the fourth year in a row.

We calculated this by looking at how many estate plans made on FreeWill came from each state and then considered that against the state-wide population according to the 2020 U.S. Census, allowing us to see which states over-indexed in will-makers.

The top five states remained identical to last year with Washington, Colorado, South Carolina, and North Carolina following behind Florida.

RANK OF WILLS OVER POPULATION SHARE	2024		2023	
1	Florida	1.19%	Florida	1.38%
2	Washington	1.17%	Washington	1.04%
3	Colorado	0.90%	Colorado	0.83%
4	South Carolina	0.82%	South Carolina	0.82%
5	North Carolina	0.77%	North Carolina	0.80%

## ESTATE PLANS MADE ABOVE POPULATION SHARE



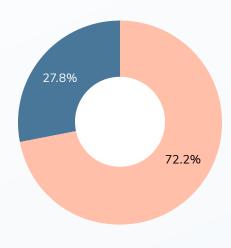
# Pet ownership

### Pet owners and estate planning

We analyzed the estate planning trends of pet owners to learn how they vary, if at all, from the general population.

Each year, we've found that pet owners are an incredibly charitable group and can be great planned giving prospects. This is especially useful for animal welfare organizations, but also helps us paint a more thorough picture of a typical planned giving donor.

#### **PET OWNERSHIP**



- PET OWNERSHIP AVERAGE GIFT VALUE

  Has pets \$43,515

  No pets \$40,427
- Pets not included in estate plan
- Pets included in estate plan



#### Key takeaway

Pet owners who choose to include their pets in their estate plan continue to be more charitable than those who do not. 28% of wills created last year through FreeWill were by pet owners, and they made up 40% of wills that included a charitable bequest.

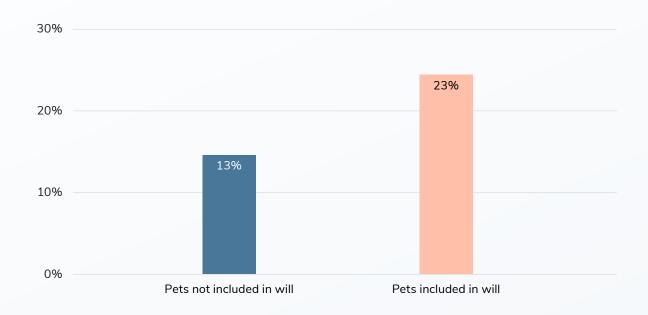
Wills created by users without pets actually increased as did the number of bequests they committed to charity. 59% of the bequests to charity were from non-pet owners compared to 56% last year.

Similarly, 60% of wills with bequests were made by non-pet owners compared to 58% the previous year.

Despite leaving a greater number of bequests, the average bequest size of donors without pets decreased by 14% to \$43,515.

## CHARITABLE BEQUESTS BY PET OWNERSHIP

% of estate plans with a charitable bequest



# Contingent gifts

 $16\%_{\,\,\uparrow}$  of wills made on our platform

included a contingent bequest

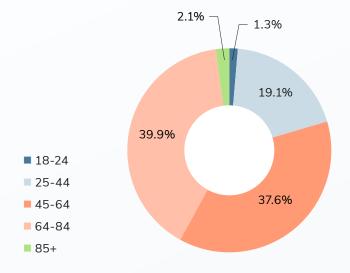
#### WHAT'S A CONTINGENT GIFT?

During the will-making process, you have the option of naming a beneficiary, or beneficiaries, to receive portions of the will-maker's estate after they die.

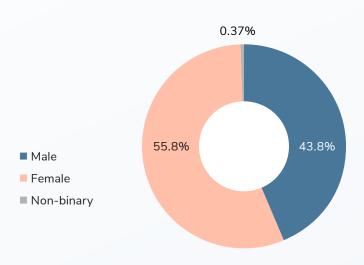
They can name primary beneficiaries — individuals or organizations who are first to receive the portion assigned to them — or contingent beneficiaries — those who would get the gift assigned to a primary beneficiary if they were unable to receive it (e.g., they passed away first).

16% of wills created through FreeWill included a contingent bequest – up from 13% last year. The average size of a contingent bequest amounted to \$389K.

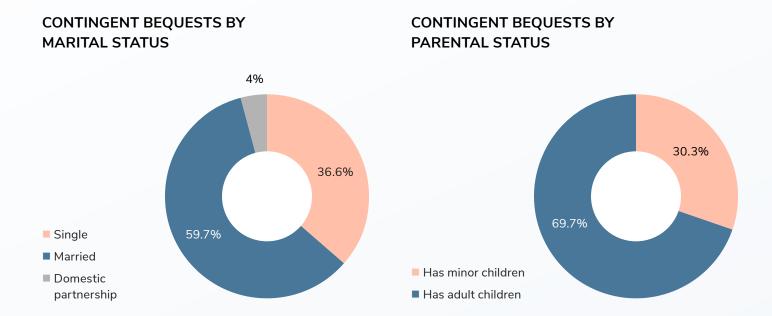
# % CONTINGENT BEQUESTS (#) BY AGE



## CONTINGENT BEQUESTS BY GENDER



Consistent with data included in last year's report, the demographics that are leaving contingent bequests in larger numbers are women, parents with adult children, and married donors.



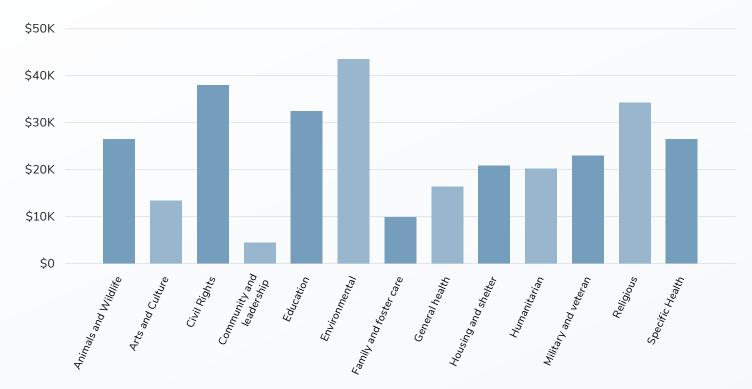
# Legacy giving by cause area

# Legacy giving by cause area

FreeWill has the privilege of working with nonprofit organizations across cause areas. In this report we looked at demographic data including age, gender, marital status, and parental status of will-makers leaving bequests, and identified trends for each cause area\*. We also tracked average bequest value and whether it increased or decreased from the previous year.

The sectors with the highest average bequest sizes were Environmental, Civil Rights, and Religious organizations. This marks the second consecutive year that Religious organizations have ranked among the top three sectors for average bequest size.

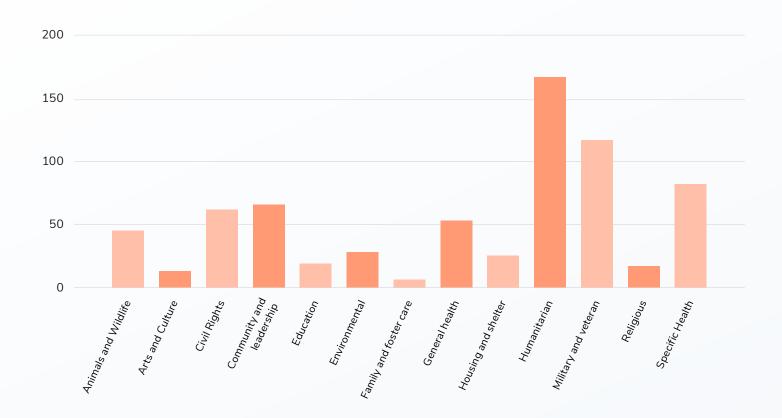
# AVERAGE BEQUEST VALUE PER DONOR BY CAUSE



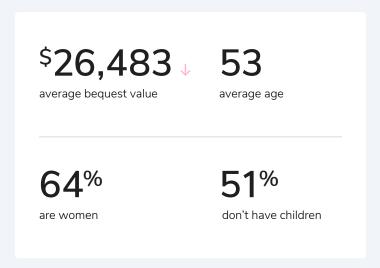
<sup>\*</sup> Data is based on FreeWill partner demographics of will-makers with one or more bequests, and may not be indicative of trends within the cause areas as a whole.

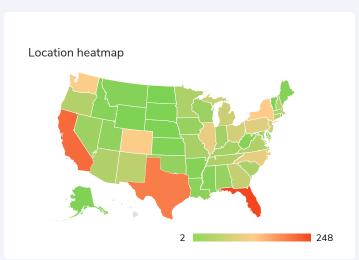
Organizations in the Humanitarian, Military and veteran, and Community and leadership sectors received the highest average of total number of bequests committed. This ranking remained consistent with 2023

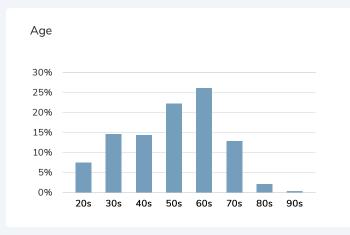
# AVERAGE BEQUEST COUNT PER NONPROFIT BY CAUSE

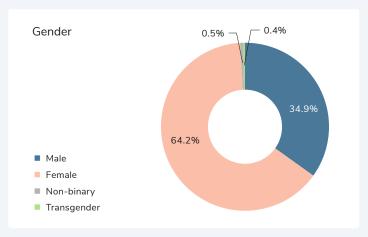


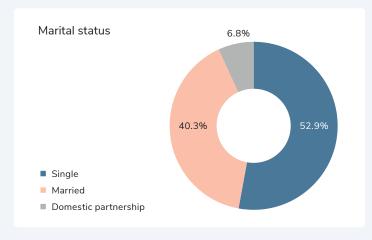
#### Animals & wildlife

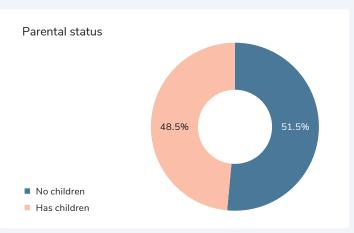




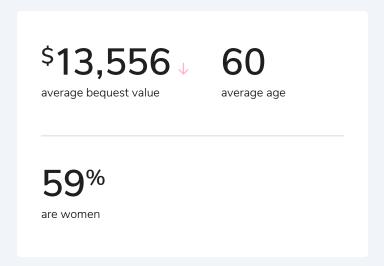


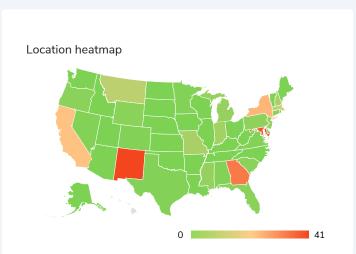


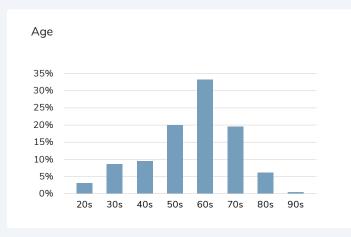


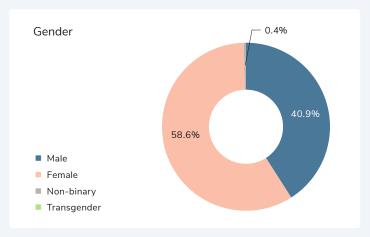


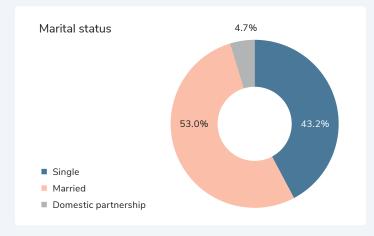
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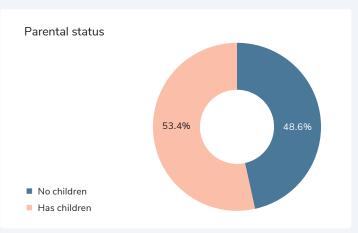




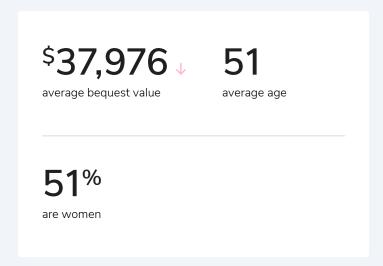


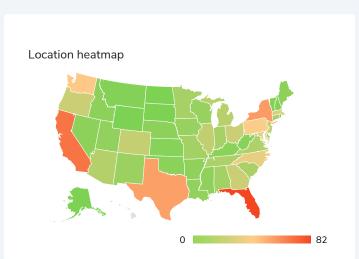


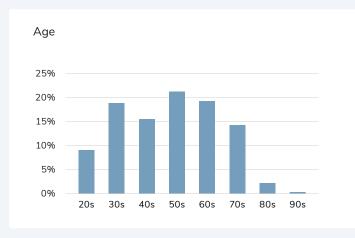


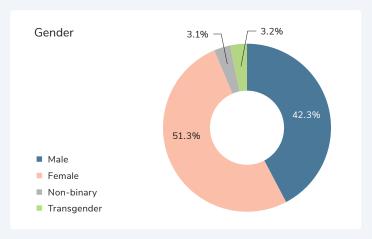


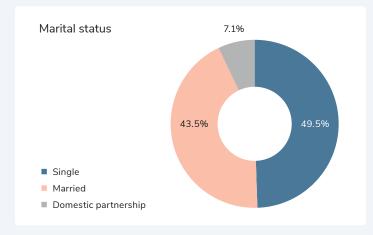
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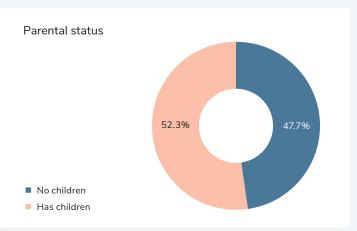




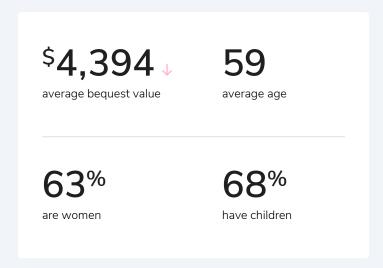


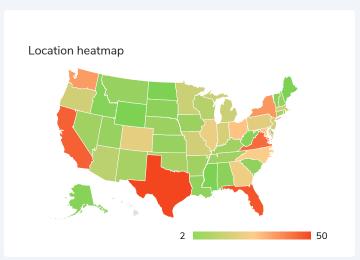


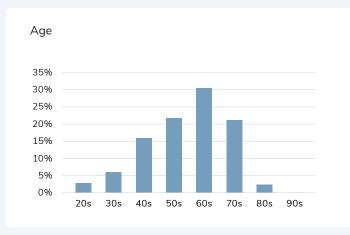


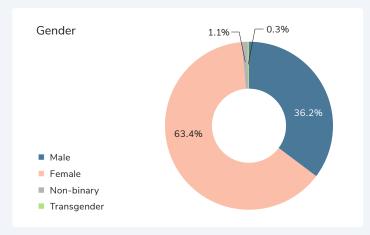


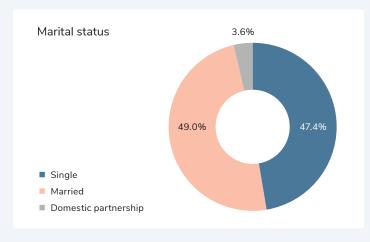
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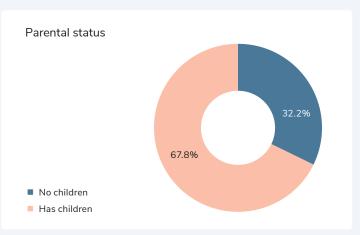




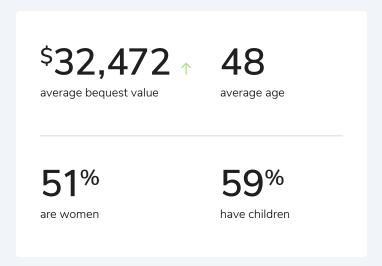


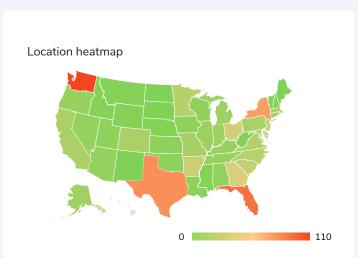


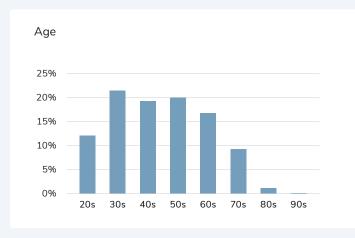


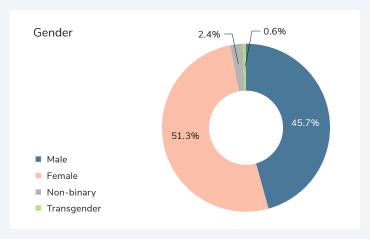


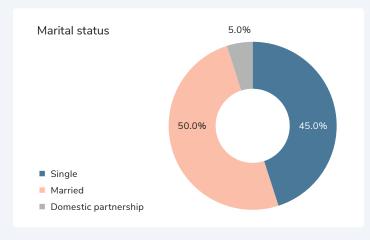
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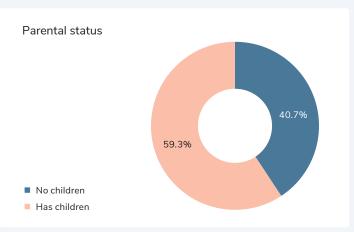






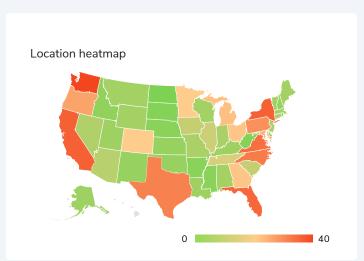


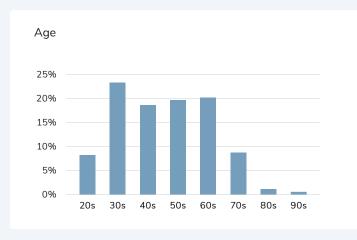


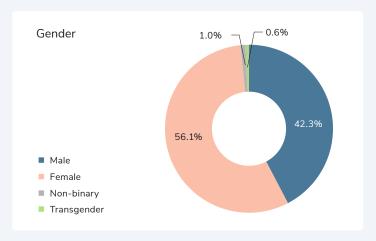


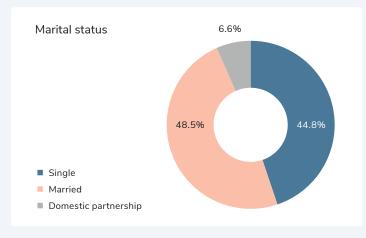
#### Environmental

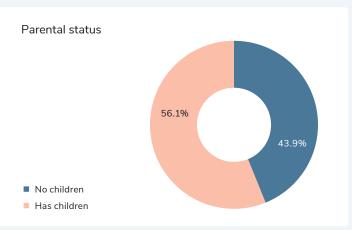






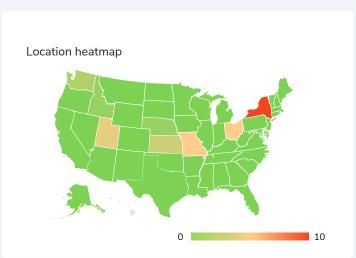


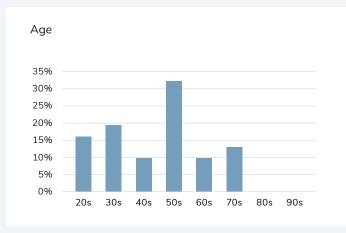


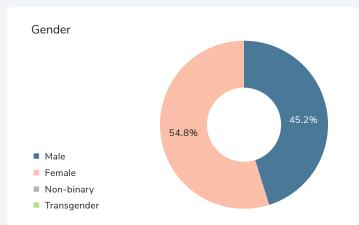


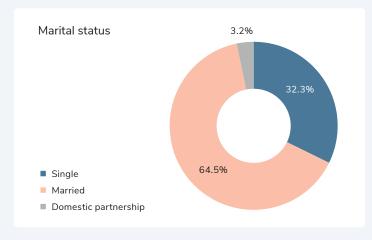
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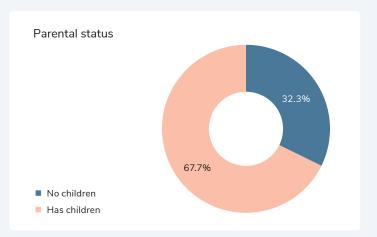




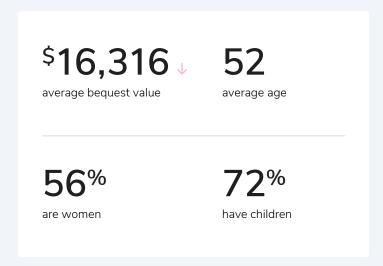


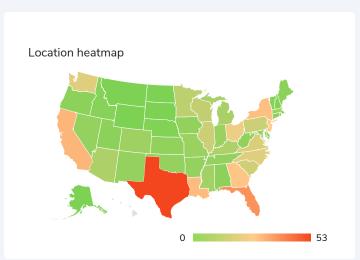


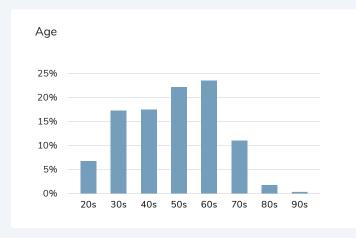


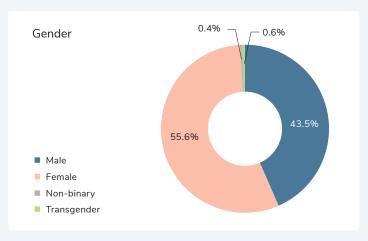


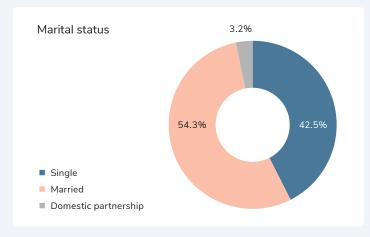
#### General health

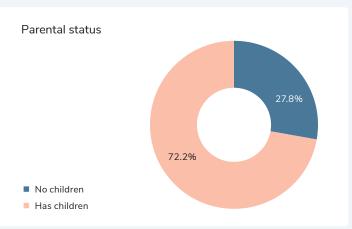




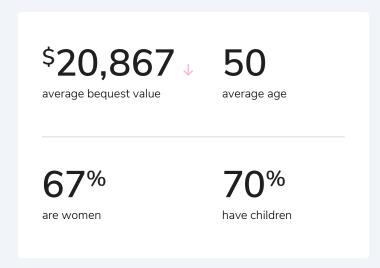


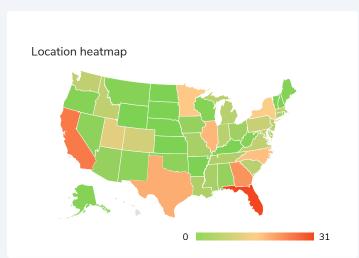


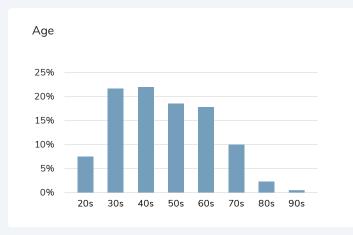


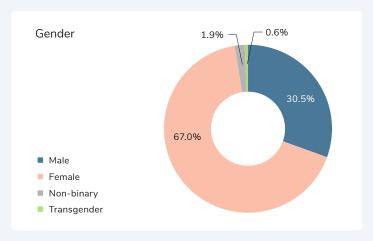


#### Housing and shelter

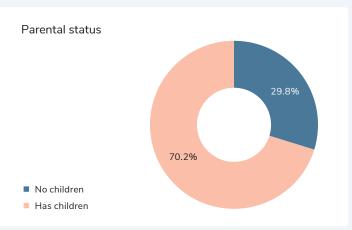




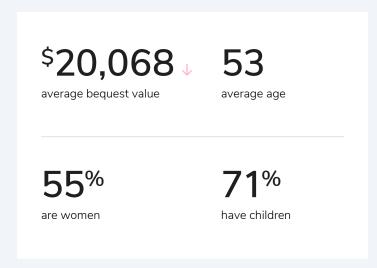


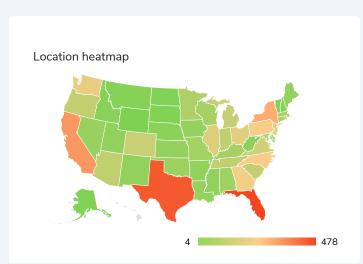


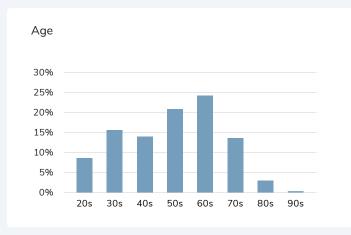


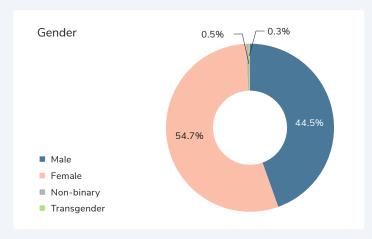


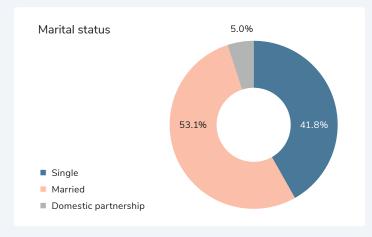
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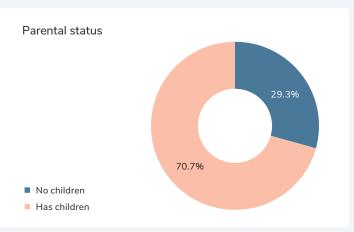




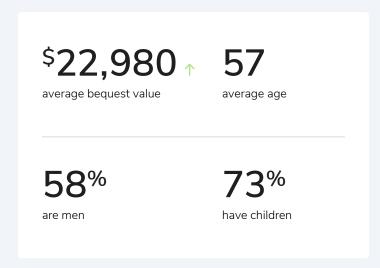


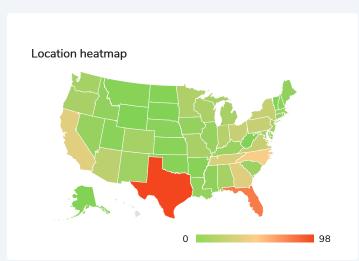


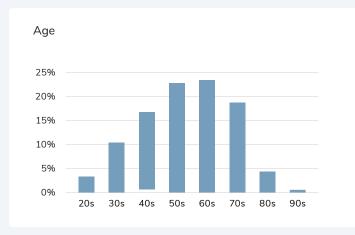


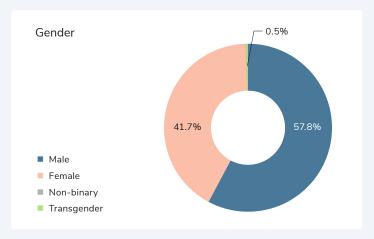


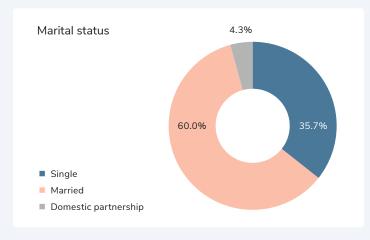
#### Military and veteran

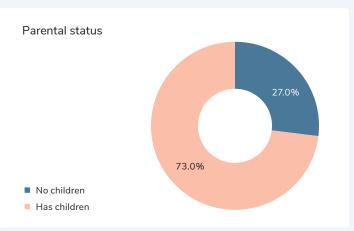




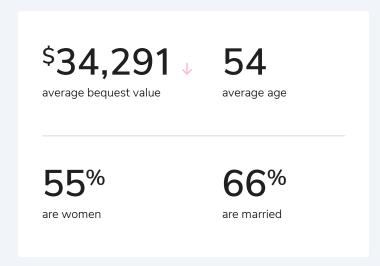


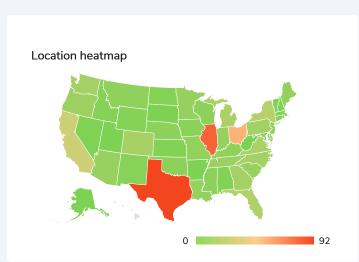


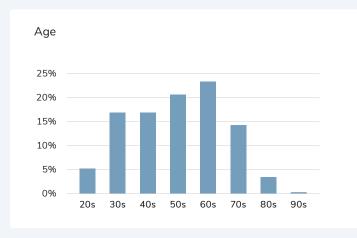




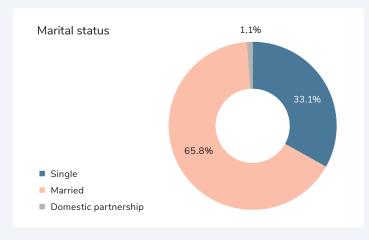
#### Religious

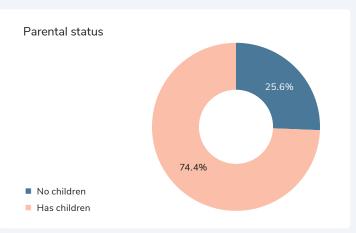




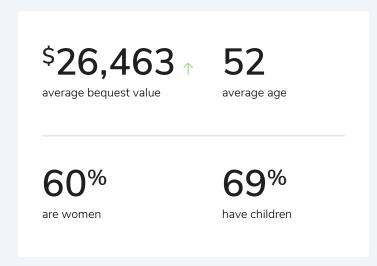


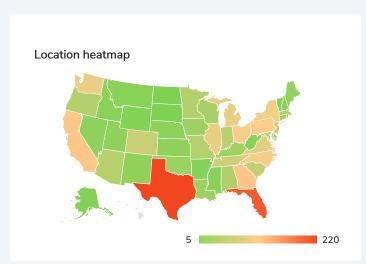


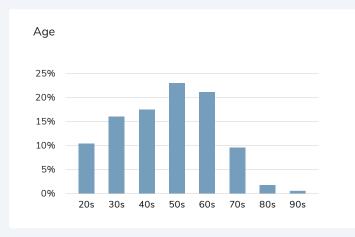


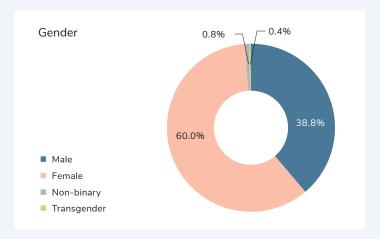


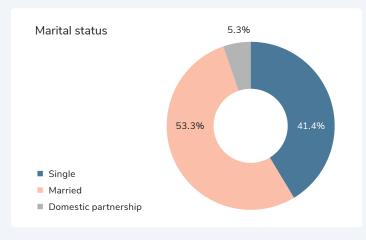
#### Specific health

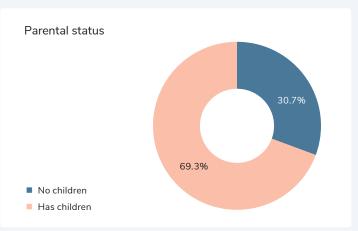












# Acknowledgments

This fourth annual report was made possible through the support of our over 1,500 amazing nonprofit partners. We are proud to support their efforts to make the world a better place, helping us move closer to achieving our mission of raising \$1 trillion for charity.

# About FreeWill

FreeWill is a charitable giving platform that makes it easier for nonprofit fundraising teams to unlock transformational gifts. Our platform combines intuitive giving tools with best-in-class strategy and training so nonprofits can find, convert, and steward more high-impact donors. Founded at Stanford University in 2017, FreeWill is supported by a team of 200+ engineers, lawyers, designers, and fundraising experts who find joy in helping nonprofits that are doing extraordinary work.

To date, FreeWill has generated more than \$10 billion in new gifts and gift commitments for thousands of nonprofit organizations

The influential original research on how technology and demographics are changing philanthropy by FreeWill co-founders

Jennifer Xia Spradling and Patrick Schmitt was published in the Stanford Social Innovation Review. FreeWill's work has since been featured in The New York

Times, The Chronicle of Philanthropy,

Forbes, and dozens of other media outlets.

FreeWill's co-founders were named "Top 50 Philanthropists" by Town & Country in 2019.



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