

Welcome, nonprofit
leaders and fundraisers!



National Make-A-Will Month

Are you ready to learn more about how National Make-A-Will Month can help you scale your legacy giving program?

In this toolkit you'll find:

- A brief history of National Make-A-Will Month
- Our 2022 Make-A-Will Month results
- Key learnings from our 2022 campaign
- Make-A-Will Month outreach examples and success stories



History of National Make-A-Will Month

In 2019, FreeWill decided to participate in a lesser known “holiday” month for the first time – **National Make-a-Will Month** – which takes place every year in August.

We saw National Make-A-Will Month as a natural opportunity to raise awareness about the importance of estate planning, while also giving nonprofit supporters a reason to make their wills and donate a part of their estate to charity.



The results are in...

Guess what? Not only does this strategy work extremely well, but **each year is better than the next.**

National Make-A-Will Month has been our top performing outreach campaign for partners three years in a row.

Last year, we raised **over \$115M** for our nonprofit partners from direct outreach written by our team.

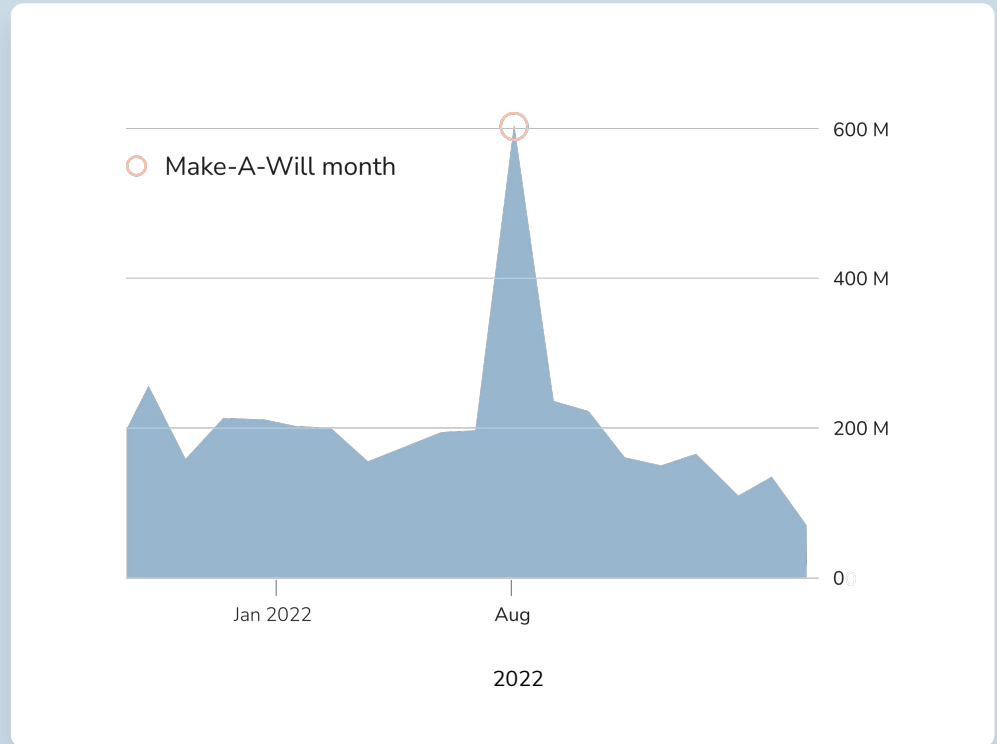
Are you ready to make this year even better?



Bequest value committed through FreeWill in 2022

Make-A-Will Month sees a huge spike in giving, both on our public will-making site (FreeWill.com) and our partners' sites.

It has proven to be a key moment to discuss planned giving with donors.



The FreeWill network effect

Our content strategy team spends the year collating learnings and providing new framing options, so you can benefit from applied learnings from our **network of 1,100+ partners.**

We'll work with you to make each year more successful than the last.



2022 Make-A-Will Month Sitewide Results

\$604M+

Raised in bequest commitments
across FreeWill.com and
partner sites

43K

Wills created during August 2022

11.3K

Bequests committed in August 2022



2022 Make-A-Will Month for FreeWill Partners

\$115M+

Raised in bequest commitments
through FreeWill outreach

66%

Partners participated

\$73M

Raised for partners with a
featuership on our public will site

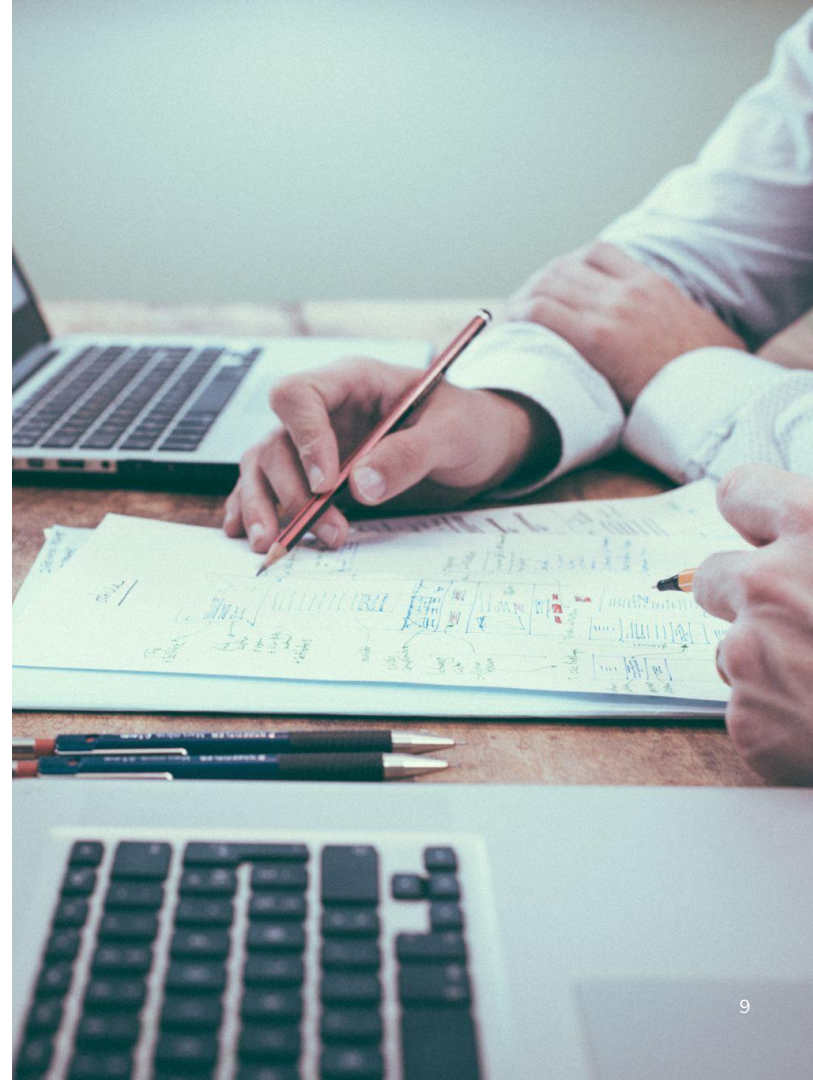


Make-A-Will Month 2022

Key Learnings

New discovery: Repetition is even more important than previously known

- Returning partners saw increased success year over year.
- Get started this year and see your results improve!

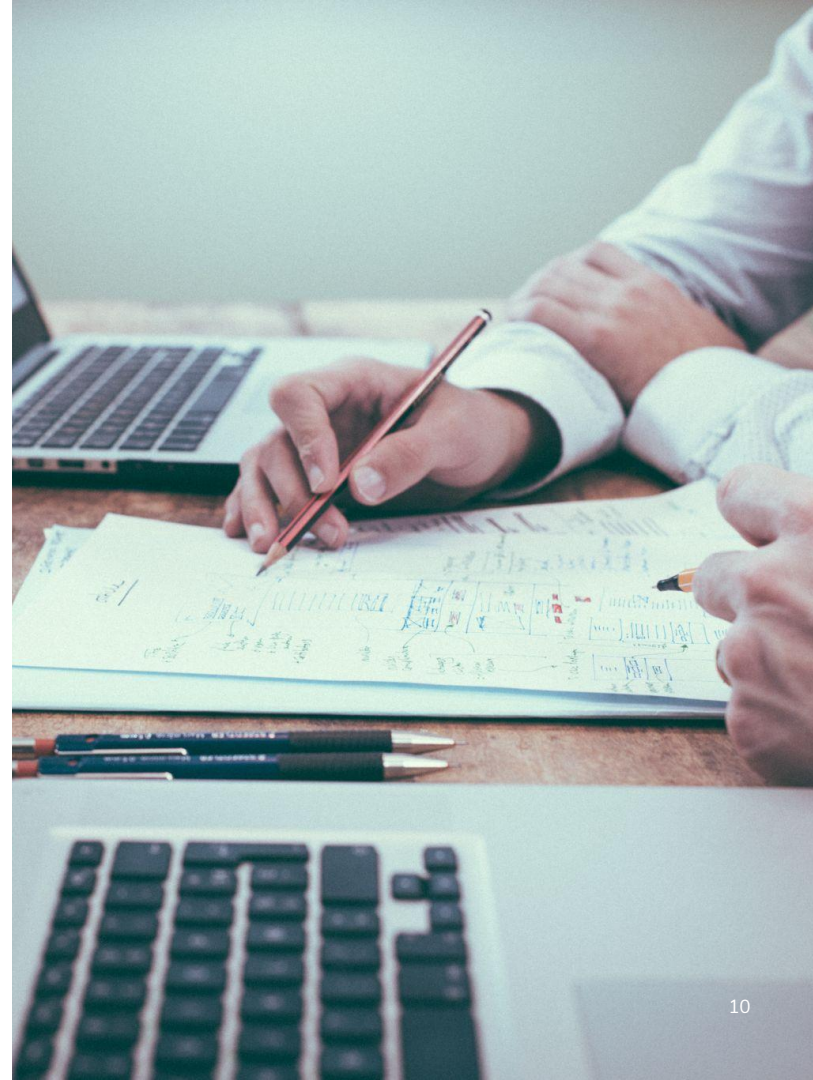


Make-A-Will Month 2022

Key Learnings

New best practice: List size matters

- Sending to more people increases giving
- We now **recommend sending your Make-A-Will Month campaign to at least 5K donors** (up from 3K)

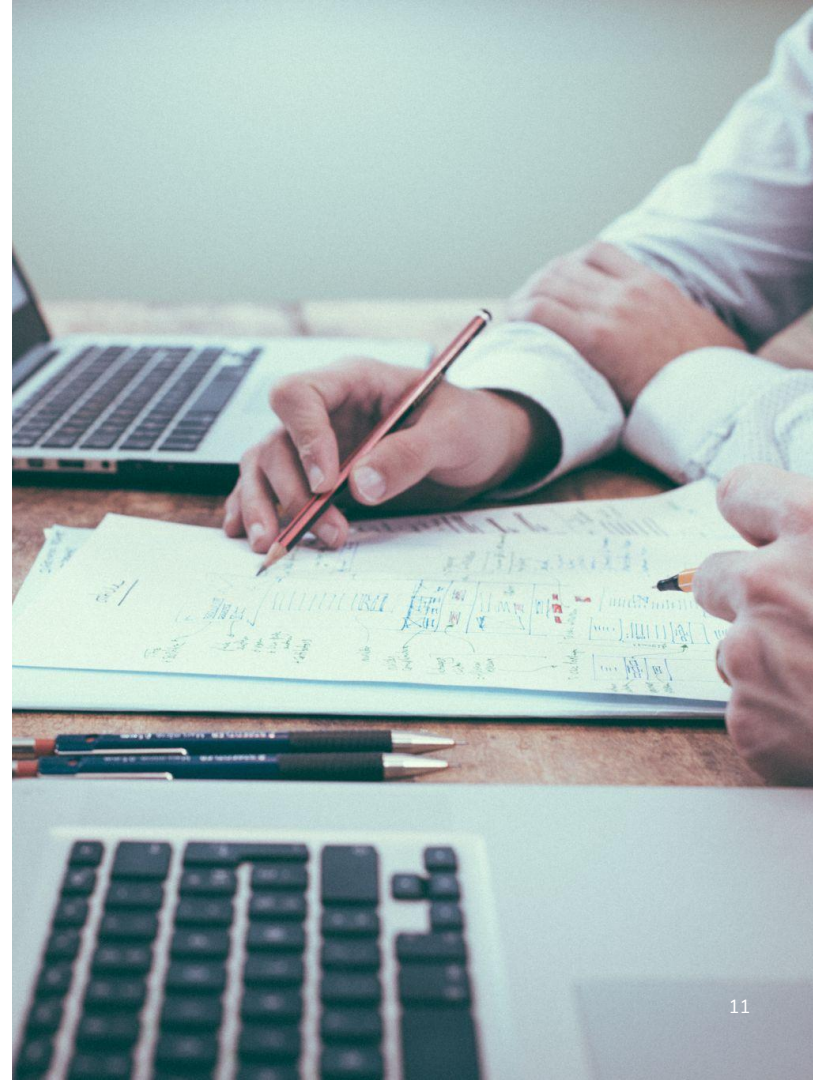


Make-A-Will Month 2022

Key Learnings

New innovation: “The All-Staff Email”


- An **internal staff email** offering free estate planning to staff drove an extremely high use rate (78%)
- This was the second highest gift generation tactic for organizations, following emails to donors




Best practices and partner success stories from our world-class content and strategy team

Our expert content team supports each and every FreeWill partner with proven outreach strategies and content adapted to your voice and style.

Read on to see examples of successful outreach and results from real partners who ran Make-A-Will Month campaigns with us!



PARTNER TOOL KIT | AUGUST 2022



National Make-A-Will Month

Don't miss this key opportunity to secure planned gifts for your cause!

FreeWill + [ORG NAME]

[March 2023] Bequest Email Campaign

****Tagged URL for this piece of copy (please [hyperlink](#) to this URL as demonstrated below): www.freewill.com/org?utm_source=partner&utm_medium=eblast&utm_campaign=2023_mawm**

Subject: A new resource for our generous community

Body:
Dear [NAME],

To thank you for your generous support, I want to share a resource to protect your own future: [this online estate planning tool](#).

JOHN MUIR HEALTH

Staff Email

RESULTS

\$233K+

committed through their branded will site

16

bequests committed



Date: August 2, 2022
To: Physicians, Nurses, Clinical and Support Staff, and Volunteers
From: HR Benefits Department
Re: New Employee Benefit: FreeWill No-Cost Estate Planning

We are excited to announce a new free and voluntary [estate planning benefit](#) available to everyone through FreeWill. August is National Make-A-Will Month, and we saw this as a timely opportunity to provide support, education, and advocacy, as nearly two-thirds of American adults do not have an up-to-date estate plan.

Consistent with our mission to improve the health of the communities we serve with quality and compassion, we believe offering FreeWill to you is a way of improving the health of the community by ensuring you have access to basic legal help that can assist your family. These estate planning resources, including [Advanced Healthcare Directive](#) and [Power of Attorney](#) tools, make it simple and free for anyone to write a legal will and plan ahead.

We hope this resource will provide support, information, and peace of mind for you and your loved ones, just as you do for the families in our community. If you have any questions, please contact us at HR.Benefits@johnmuirhealth.com.



GUIDEPOSTS FOUNDATION Make-A-Will Month Email Follow Up

RESULTS

\$195K+

committed through their branded will site

20

Bequests committed



It's National Make-A-Will Month!

Take the time to plan for the people
and causes you love, for free.



FREEWILL |  Guideposts
Foundation

Dear Friend,

Did you see our message about National Make-a-Will Month?

Every August, we are reminded to take a moment to think about the people we love and the causes we care about and to check this important task off our to-do list.

To help you get started, you can use FreeWill, a free, online resource that guides you through the process of creating your will, and it only takes 20 minutes to complete.

[Create my plans today](#)

In 20 minutes or less, you can protect all the people you love and create your legacy!

I hope you use Make-a-Will Month as a time to reflect on the people in your life and to consider a legacy with the Guideposts Foundation to inspire more hope and faith in the world.

Gratefully,

Catherine Halkett
President, Guideposts Foundation

P.S. If you've already included a gift to the Guideposts Foundation in your will or trust, [Please fill out this form to let us know!](#) We would love to thank you for your generosity.

LEGAL ADVOCACY GROUP

Make-A-Will Month Email

RESULTS

\$2.6M+

committed through their branded will site

63

Bequests committed



National Make-A-Will Month

Don't miss this key opportunity to secure
planned gifts for your cause!

FREEWILL 



[March 2023] Bequest Email Campaign

Subject: A new resource for our generous community

Body:

Dear [NAME],

To thank you for your generous support, I want to share a resource to
protect your own future: [this online estate planning tool](#).

MEDICAL RESEARCH AND EDUCATION Make-A-Will Month 2-Part Email Campaign

RESULTS

\$2.6M+

committed through their branded will site

101

Bequests committed



National Make-A-Will Month

Support science and include Apex Medical
Innovations in your long-term plans.

FREEWILL 



[March 2023] Bequest Email Campaign

Subject: A new resource for our generous community

Body:

Dear **[NAME]**,

To thank you for your generous support, I want to share a resource to protect your own future: [this online estate planning tool](#).

MILLIKIN UNIVERSITY

Make-A-Will Month / Bequest Launch Social Post

- Send Date: July 31, 2022
at 5:00 PM
- Best practices followed:
 1. Educational FreeWill video
 2. Concise message
 3. Specific segmented audience

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

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

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

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

✓ Last Will & Testament
✓ Beneficiaries

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

👍❤️ 20 3 Shares

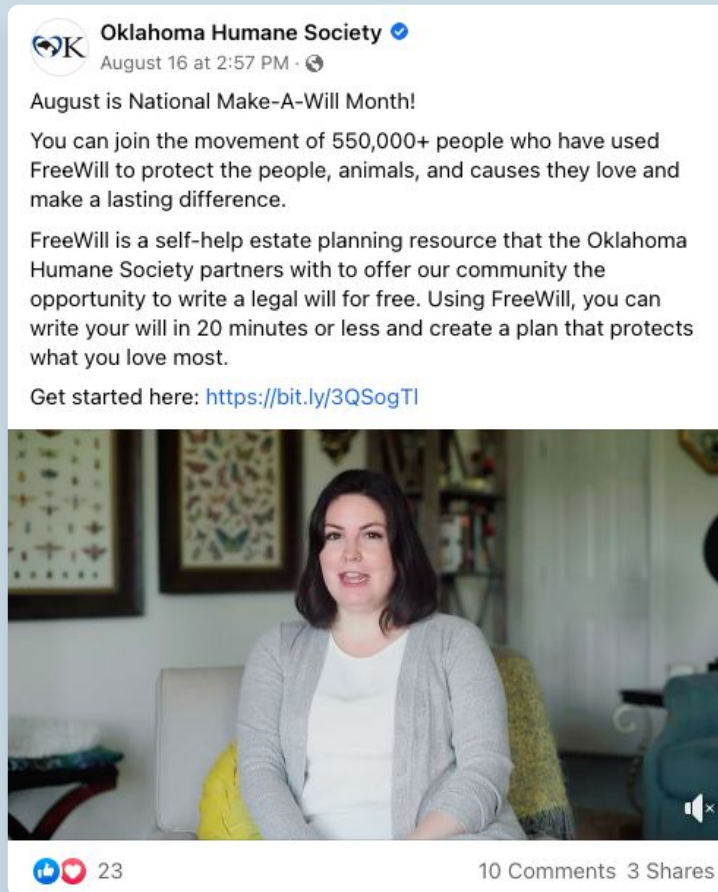


OKLAHOMA HUMANE SOCIETY

Make-A-Will Month

Social Post

- Send Date: August 15, 2022 at 2:57 PM
- Best practices followed:
 1. Educational tone
 2. Social proof
 3. Donor testimonial in video format



The image is a screenshot of a Facebook post from the Oklahoma Humane Society. The post is dated August 16 at 2:57 PM. The text of the post reads: "August is National Make-A-Will Month! You can join the movement of 550,000+ people who have used FreeWill to protect the people, animals, and causes they love and make a lasting difference. FreeWill is a self-help estate planning resource that the Oklahoma Humane Society partners with to offer our community the opportunity to write a legal will for free. Using FreeWill, you can write your will in 20 minutes or less and create a plan that protects what you love most. Get started here: <https://bit.ly/3QSogTI>". Below the text is a video thumbnail showing a woman with dark hair, wearing a grey cardigan over a white top, sitting in a chair and smiling. The video player interface shows 23 likes, 10 comments, and 3 shares.

TEMPLATE COPY

Make-A-Will Month Email

FreeWill Email Best Practices:

- Clear, bold CTA button
- Format for clarity (leverage bolding and bullet points)
- Include an image in the header
- Consider including a headshot in the senders' signature to add a personal touch!



August is National Make-A-Will Month, so I wanted to reach out with a free resource that thousands have already used to take care of their families: an online will-writing tool.

This is a free, easy way to protect the people and communities you love. I know that writing a will is one of those tasks that can fall by the wayside — but luckily, you can use this tool to create yours in under 20 minutes.

[Write my free will](#)

Everyone needs a will, whether they're 18 or 80. And there's no better moment than now to find some peace of mind in planning for the future.

While you're writing your will, you'll also have the opportunity to join the amazing people who have helped [mission] by including legacy gifts in their wills.

TEMPLATE COPY

Make-A-Will Month

Social Post



TEMPLATE COPY

Make-A-Will Month

Social Post



FreeWill

326 followers

20 h • 🌐



Protect those you love while creating opportunities for the causes you care about through a planned gift. Get started today. Visit freewill.com to learn more.



88 • 4 comments



Like



Comment



Share



Send



**More resources
to set you up for
success!**

To use:

[Writing guides and donor outreach templates](#)

To watch:

[Webinar: The state of planned giving in 2022, and what to do in 2023](#)

To read:

[2022 Planned Giving Report](#)

[Make-A-Will Month marketing: 3 tips to boost planned giving](#)

To share with your donors:

[3 reasons to make a will this month Make-A-Will month](#)



3 ways a FreeWill partnership will take your Make-A-Will month efforts to the next level:

1. Access to exclusive partner trainings to help you solicit legacy gifts
2. Customized, data-backed content for your Make-A-Will month campaign
3. Customized, data-backed content for your Make-A-Will month campaign



We're ready to help you implement these learnings for your 2023 Make-A-Will Month campaign.

Become a FreeWill partner by **June 16th** to participate in National Make-A-Will Month with us this year. Get in touch with our team by [completing this form](#).

We look forward hearing from you!



Thank you!

Patrick Schmitt
Co-Founder, Co-CEO

E. patrick@freewill.com

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