

2023 National Estate Planning Awareness Week

Playbook for nonprofit leaders and fundraisers



National Estate Planning Awareness Week

Are you ready to learn more about how to
successfully scale your planned giving program
During National Estate Planning Awareness Week
(NEPAW) in October?

Here you will find:

- Best practices for planned giving during NEPAW
- Success stories from our partners
- Templates and additional resources



What is National Estate Planning Awareness Week?

National Estate Planning Awareness Week (NEPAW) is a nationally-recognized week and a natural opportunity to help close the estate planning gap of about two thirds of Americans without an up-to-date will.

October is the perfect time to share free, online estate planning tools with your donor-base, encourage your supporters to cross “make a will” off their lists, and generate gifts in the process.

In 2023, NEPAW takes place on October 16th-22nd.



Why is it so important for nonprofits to participate in NEPAW?

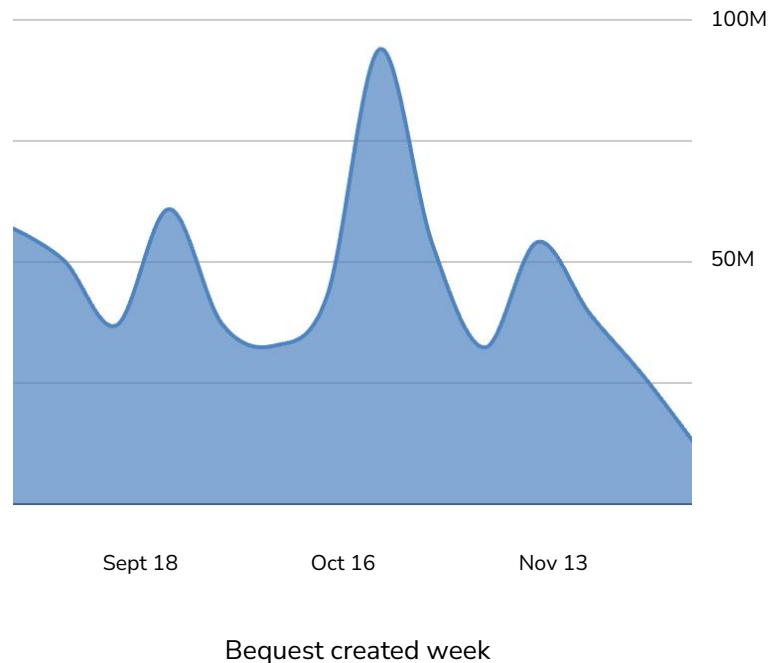
Every year, we see a spike in giving during NEPAW, and it has proven to be a key moment to discuss planned giving with your donors.

Last year, our partners raised **over \$19M, which is more than 11 times higher than an average week at FreeWill**, from direct outreach written by our team.

In addition, FreeWill outreach helped to drive a **3.4X** lift in traffic to our partners' legacy giving branded landing pages, where their supporters can begin creating their will and include the organization as a beneficiary.



Bequest value committed through FreeWill by week
Fall 2022





So how did they do it?

Read on for key learnings from years' past and our team of former fundraisers, innovators, and experimenters, working tirelessly to bring our **1300+ nonprofit partners** the best possible outcome for each campaign:

- Channels & Framing
- Subject lines
- Repetition

*And as a bonus, we've included an **example campaign** from one of our partners who graciously let us share with all of you, and a **template email** for you to try within your campaign!*

NEPAW

Channels & Framing

Email is the most effective channel for promoting National Estate Planning Awareness Week

- Send at least one email to your donor base, with reinforcement and an internal staff email to increase traffic and awareness
- Last year, our team found campaigns with educational content drove the highest traffic, whereas donor testimonials were strongest for driving gifts



Subject lines



Check out top subject lines from last year's campaign:

- Create Your Plan With Ease
- Cross this item off your list
- Protect your future with [insert your organization name]
- Prepare for the future this week

Why did they work?

- Short and to the point
- Creates an offer for your supporters
- Generates urgency



NEPAW Repetition



Similar to Make-A-Will Month, repeating a campaign leads to more success the following year

- Returning partners saw increased success year over year
- Adding planned giving campaigns to your yearly outreach calendar will pay dividends in the long term
- Get started this year and see your results improve!



OREGON HUMANE SOCIETY

Supporter Email Example


RESULTS

\$5.9M

committed through their
branded legacy giving page

25

bequests committed



In honor of National Estate Planning Awareness Week, we are pleased to share a new, *free* estate planning resource with you: [FreeWill](#). At the Oregon Humane Society, we believe **everyone needs a plan** in order to:

- Protect the people and pets they care about most
- Plan beneficiaries for their assets
- Create a lasting legacy of care and compassion for animals

[CREATE MY FREE PLAN](#)

[If you don't have an up-to-date plan, we invite you to use these free, online services.](#) FreeWill's simple solutions have helped more than 350,000 people write a legal will and create other important estate planning documents.

Now is the purrfect time to plan for the future. With your support, the Oregon Humane Society can continue to find loving homes for shelter pets, provide affordable spay/neuter surgery, fight animal cruelty and neglect, and create a more humane society for pets in our community. **Let us know if you have any questions or feedback on this new resource.**

TEMPLATE COPY

National Estate Planning Awareness Week 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 sender's signature to add a personal touch!



Subject: Cross this item off your list, [NAME]

Dear [NAME],

This week is National Estate Planning Awareness Week, a moment when we are encouraged to plan ahead and protect our loved ones by creating an estate plan.

In addition to protecting those you love, I want to share one powerful way you can support [ORG] in your estate plans that will cost you nothing during your lifetime — making a gift in your will. It's an important way to secure the work of our organization for years to come, and allows you to create a legacy with a cause that is close to your heart.

[Write my free will](#)

If you have any questions, or are looking to connect deeper with [ORG], please do not hesitate to reach out!

Many thanks,
[SIGNATURE]

More resources
to set you up for
success!

To use:

[NEPAW email templates](#)

[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](#)



3 ways a FreeWill partnership will take your Planned Giving program to the next level

1. Provide free, intuitive, and user-friendly online estate planning tools to your supporters
2. Customized, data-backed content for your campaigns
3. Access to exclusive partner trainings to help you solicit legacy gifts



We're ready to help you implement these learnings for your 2023 National Estate Planning Awareness Week campaign.

Become a FreeWill partner by **September 8** to participate
in National Estate Planning Awareness week with us this year.
Get in touch with our team by [completing this form.](#)

We look forward hearing from you!

