



BUILT FOR STEWARDSHIP

# How FreeWill helps you track, understand, and thank better

April 9, 2026

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How we'll think about  
portal data today:

FIND → MAINTAIN → USE

# About This Session

Stewardship isn't just about sending thank-you notes. It's about building relationships that lead to deeper engagement and future gifts. In this product-focused session, FreeWill Product Managers Omar Antila and Trisha Arora share how partners are using FreeWill data to steward with more intention — moving beyond acknowledgment into real cultivation.

Together, we'll explore how to use Portal to segment donors thoughtfully, identify the right next step for each relationship, and build outreach that feels personal even at scale — whether you're stewarding planned gifts (bequests, beneficiary designations) or smart gifts (QCD, DAF, Stock, Crypto). You'll leave with actionable tips to make FreeWill your donor stewardship superpower in the next 90 days.



# Agenda

1. Introduction to portal
2. Find and Maintain the Data: Key planned and smart gift demographics
3. Use the Data: Portal tools to act on what you know
4. Your 90-day action plan

# Housekeeping

1. This session is being recorded
2. The recording will be available here later today
  - Later this month, we'll add it to the Learning Hub (accessible in your portal)
3. The slide deck can be downloaded from the Zoom lobby session description



# Introduction to portal

# Level-setting on partner portal

- Portal is your one-stop shop for all your FreeWill-sourced gift and donor data
- Your fundraising superpower
- Use portal to:
  - Find demographics
  - Manage changes and track communications
  - Draft emails and notes



# What are you missing?

- Every planned gift and smart gift as it comes in
- Donor insights to personalize your outreach
- Track stewardship touches
- Generate thank-you notes with one click



# Thank You vs. Stewardship

Level Setting

## Thank You

A specific moment of appreciation after a gift. It's a discrete action: the receipt, the note, the call, the video that says "we're grateful."



## Stewardship

Stewardship is the **ongoing work** of helping a donor feel **known, valued, and connected** to their impact.

## The Difference

Most organizations are good at thank-yous.

**The ones that grow their planned giving programs are the ones that don't stop there.**

# Why Stewardship Matters

- A typical planned gift is 200 to 300 times the size of a donor's largest annual gift. (Giving USA)
- Partners with planned giving programs see a 75% increase in annual giving
- Bequest donors can change their wills at any time, so the org with the relationship keeps the gift
  - HOWEVER while more than  $\frac{2}{3}$  of donors change their will, 25% report changing the GIFTS within the will.



# Three ways to put your portal data to work

## FIND THE DATA

Know who your donors are and what they're telling you

## MAINTAIN THE DATA

Update portal information for gift and stewardship tracking

## USE THE DATA

Steward your donors using what portal gives you



FIND/MAINTAIN THE DATA

# Key Planned and Smart Giving Demographics

# Trisha screen share

FIND/MAINTAIN PG DEMOGRAPHICS



# Recap - Planned Gifts

- **Legacy commitments page - filter by:**
  - gift type
  - Plan status
  - Gift status
  - Beneficiary level
- **Gift details - review:**
  - Contact and email info
  - Insights
  - DonorSearch info



# Recap - Planned Gifts

- Update Legacy Gift Statuses
  - **Identified** – the default status for all gifts
  - **Request Confirmation** – you’ve reached out and are requesting the donor confirm the gift
  - **Confirmed** – the donor has responded and confirmed
  - **Realization Notification** – the gift is in probate
  - **Received** – you’ve received the funds
  - Keeping these updated helps us report on how many gifts are confirmed or realized – we need that data from you so we can share best practices and generalized trends across the network
  - **Adding a Bequest**



# Recap - Smart Gift Status fields

**Started:** Currently applies to stock gifts only and means the donor began the online flow but didn't finish. This is your high-priority outreach moment. Contact the donor or their financial advisor within 24 hours.

**Identified:** The donor completed the online gift flow. They've shown clear intent to give, but offline steps are still needed. Follow up with a thank-you, and once the indicated transfer date passes, reach out to confirm the gift is on its way.

**In Transit:** The online flow is complete, and no further action is needed from the donor. If there's no movement after two weeks, portal will alert you.

**Received:** Funds have arrived, and it's time to steward: send a personalized confirmation and a thank-you.





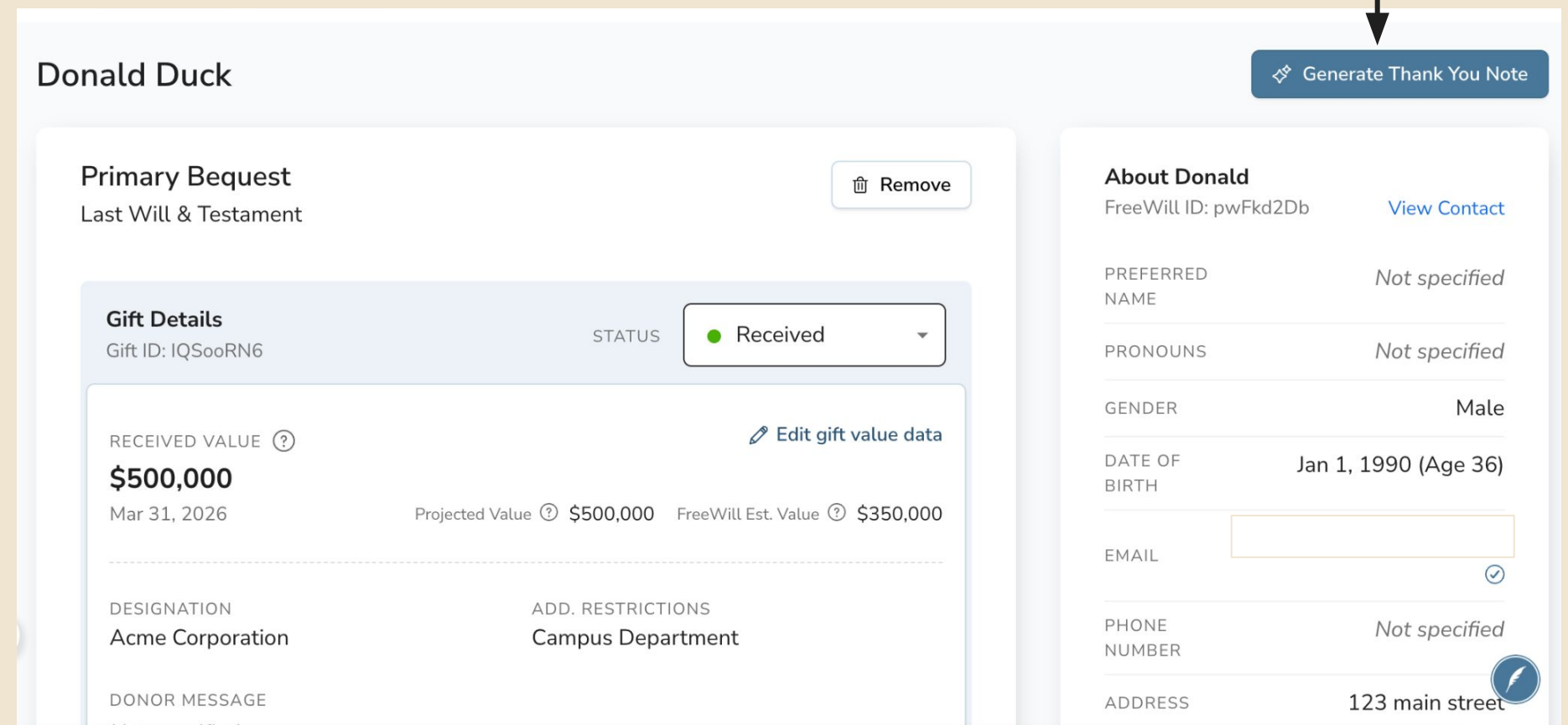
USE THE DATA

Features built into portal to  
help you effectively steward  
your planned and smart giving  
donors

# Foundational portal tools to use today!

## One-click legacy thank you

Specific for planned gifts from the Gift Details page, this button allows you to use William to create a Legacy Gift Thank You Note directly from the donor's record



The screenshot displays a donor record for Donald Duck. At the top right, a blue button labeled "Generate Thank You Note" is highlighted with a black arrow. The record is divided into several sections: "Primary Bequest" (Last Will & Testament) with a "Remove" button; "Gift Details" (Gift ID: IQSooRN6) with a "Received" status and an "Edit gift value data" link; "About Donald" (FreeWill ID: pwFkd2Db) with a "View Contact" link; and a list of personal details including preferred name, pronouns, gender, date of birth, email, phone number, and address.

Field	Value
Primary Bequest	Last Will & Testament
Gift ID	IQSooRN6
Status	Received
Received Value	\$500,000
Received Date	Mar 31, 2026
Projected Value	\$500,000
FreeWill Est. Value	\$350,000
Designation	Acme Corporation
Add. Restrictions	Campus Department
Donor Name	Donald Duck
FreeWill ID	pwFkd2Db
Preferred Name	Not specified
Pronouns	Not specified
Gender	Male
Date of Birth	Jan 1, 1990 (Age 36)
Email	[Redacted]
Phone Number	Not specified
Address	123 main street

# Foundational portal tools to use today!

## Learning Hub

A section of the Partner Portal where partners can explore and register for upcoming trainings available exclusively to active FreeWill partners, and view recordings of past sessions that may be of interest to their team. These trainings cover various topics, including FreeWill best practices, campaign strategies, more general fundraising, and nonprofit knowledge, and our free Planned and Smart Giving Certificate curricula.



### Be a Partner Portal power user!

Join our quarterly "deep dive" into the Partner Portal, to explore important but under-used sections, review recent feature releases you may have missed, and preview new updates that are coming soon. Keep your Portal skills sharp. Join us, and bring your questions!

Thu, Apr 30 at 1:00pm ET

→ Save your spot



### Campaign Info Session: Summer Smart Giving

Sending smart giving outreach throughout the year is a *key strategy for success*, priming donors to give at year-end. Summer 2026 is a great time to reinforce your smart giving message and continue educating donors about the benefits of non-cash gifts.

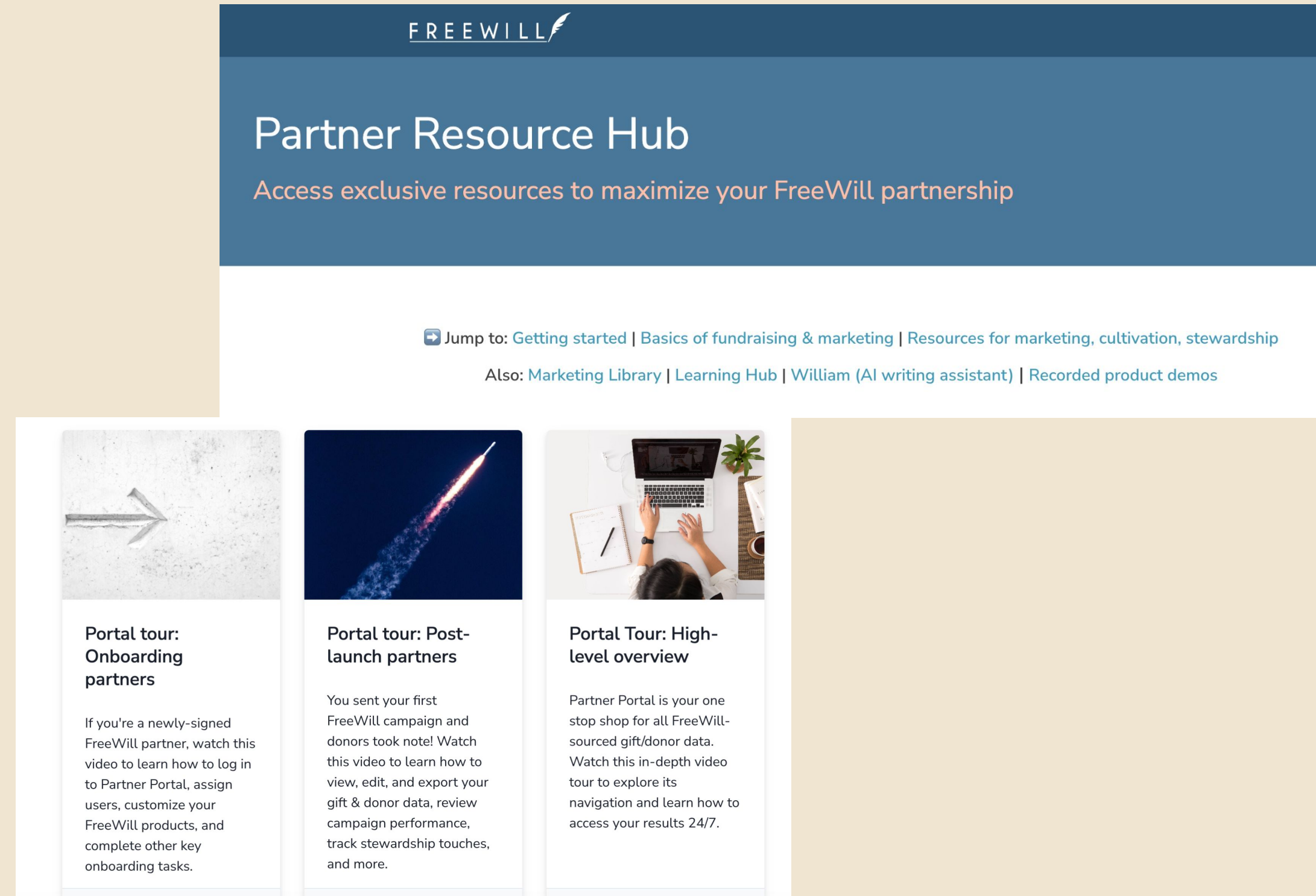
Thu, Apr 30 at 2:30pm ET

→ Save your spot

# Foundational portal tools to use today!

## Partner Resource Hub

An exclusive online hub where FreeWill partners can access helpful articles, best practices, guides, templates, tips for success, and more to support their FreeWill partnership.



The screenshot shows the FreeWill Partner Resource Hub interface. At the top, the FreeWill logo is displayed in a dark blue header. Below the logo, the title "Partner Resource Hub" is prominently featured in white text, followed by the subtitle "Access exclusive resources to maximize your FreeWill partnership" in a smaller, orange font. A navigation bar contains several links: "Jump to: Getting started | Basics of fundraising & marketing | Resources for marketing, cultivation, stewardship". Below this, a secondary row of links reads "Also: Marketing Library | Learning Hub | William (AI writing assistant) | Recorded product demos". The main content area features three vertical cards, each with a distinct image and a title. The first card, titled "Portal tour: Onboarding partners", features a grey arrow pointing right and describes a video for newly-signed partners. The second card, "Portal tour: Post-launch partners", shows a rocket launch and describes a video for partners who have already launched campaigns. The third card, "Portal Tour: High-level overview", depicts a person working at a laptop and describes a comprehensive video tour of the portal's features.

**FREEWILL**

## Partner Resource Hub

Access exclusive resources to maximize your FreeWill partnership

Jump to: [Getting started](#) | [Basics of fundraising & marketing](#) | [Resources for marketing, cultivation, stewardship](#)

Also: [Marketing Library](#) | [Learning Hub](#) | [William \(AI writing assistant\)](#) | [Recorded product demos](#)

**Portal tour: Onboarding partners**

If you're a newly-signed FreeWill partner, watch this video to learn how to log in to Partner Portal, assign users, customize your FreeWill products, and complete other key onboarding tasks.

**Portal tour: Post-launch partners**

You sent your first FreeWill campaign and donors took note! Watch this video to learn how to view, edit, and export your gift & donor data, review campaign performance, track stewardship touches, and more.

**Portal Tour: High-level overview**

Partner Portal is your one stop shop for all FreeWill-sourced gift/donor data. Watch this in-depth video tour to explore its navigation and learn how to access your results 24/7.

# William

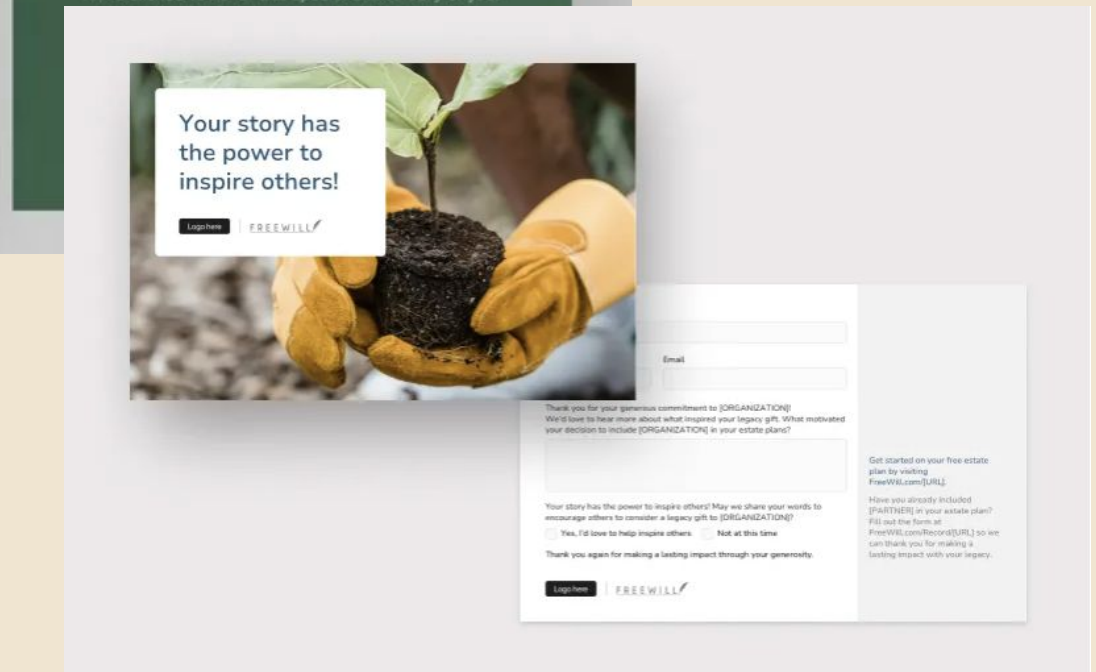
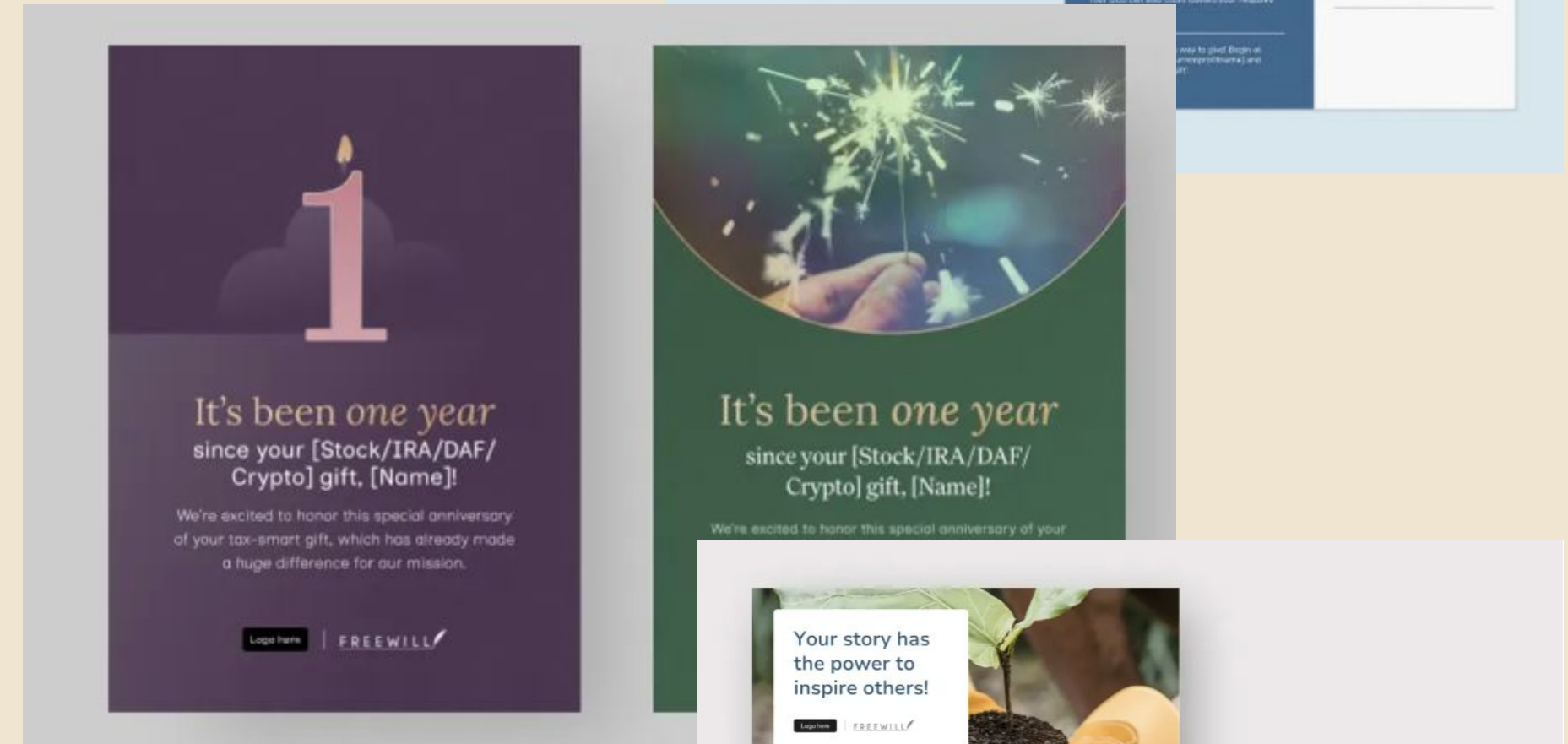
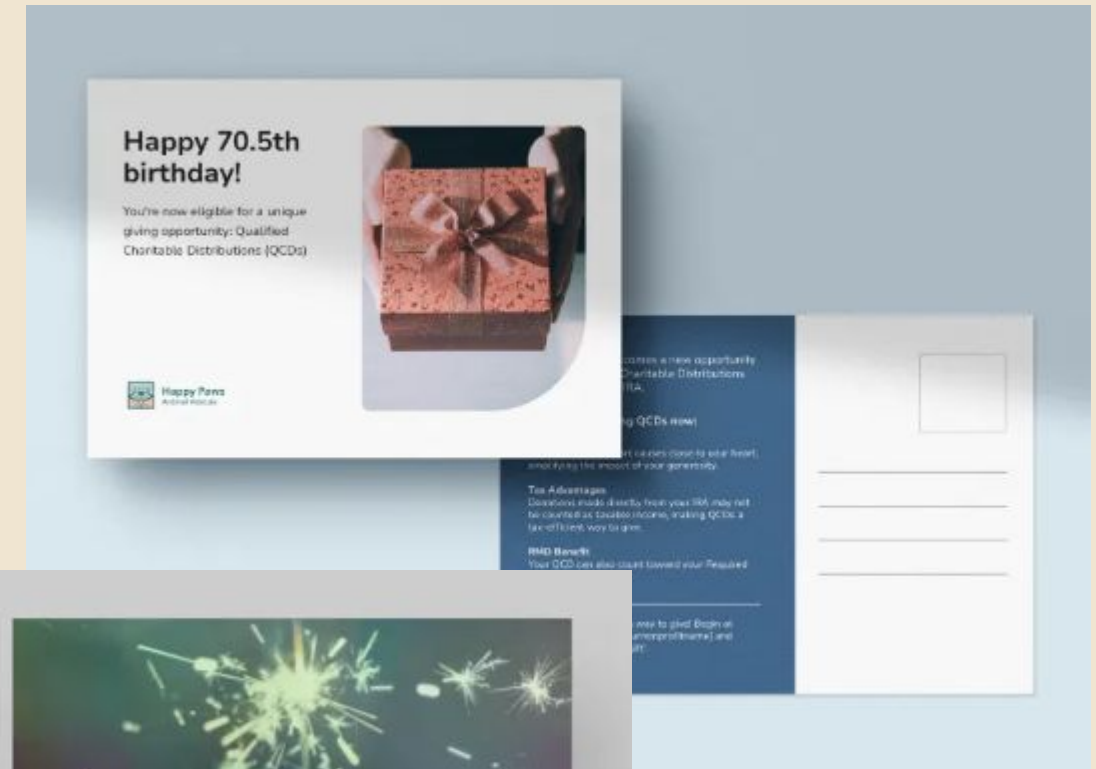
- Use William to overcome writer's block and draft personalized, authentic donor outreach in seconds
- **Tailored Stewardship:** Ask William to refine your message for specific donor segments, or include invitations to “next steps”
- **Efficiency Meets Heart:** Balance the speed of AI with the “Big Heart” of your organization by using William as a starting point for every thank-you note



# Marketing Library

Maximize your outreach and collateral without the high-production costs

- Use postcard templates to acknowledge gift anniversaries
- Maximize QCD giving – say thank you with special birthday postcards
- Encourage story-telling





# Your 90-day action plan

## Your 90-Day Stewardship Quick Start - *Immediately*

1. SEGMENT your Portal data this week - by age, gift type, bequest designation level, and location.
2. ASSIGN a “next move” and owner to every donor in portal: attorney connection, confirmation call, impact story, recognition invite, or travel visit (prioritize by recency)
3. RESPOND within 48 hours to any donor who left a message in FreeWill with a personal outreach touchpoint (phone or handwritten note preferred) - Pro-tip: Use William to help



## **Your 90-Day Stewardship Quick Start - *In the next month***

1. **ENABLE** your Anonymous Donor Stewardship feature, if not already done
2. **RUN** a DonorSearch screen on your Portal list to overlay capacity and affinity data - then prioritize the top 20% for high-touch stewardship.
3. **BUILD** one personalized stewardship series for each smart gift type (QCD, DAF, Stock, Crypto) - tailored to the financial motivation and channel preferences of that segment.



## Your 90-Day Stewardship Quick Start - *In this quarter*

1. COMPLETE “next move” action items according to recency and appropriate timing
  - Plan future moves based on outcomes
2. UPDATE portal status fields and CRM
  - Use comments to note what has *already* been done



# Layering DonorSearch Data in your Partner Portal

- Prospect research should be an ongoing process – not just for new donor identification, but for developing data-driven stewardship strategies for existing donors.
- DonorSearch, a donor screening tool designed to help identify philanthropic individuals with a clear history of high-dollar giving to other organizations, is incorporated in partner portal

## Features:

- Giving capacity – To determine assignment to Major/ Principal Gifts team
  - Largest known gift to similar mission-focused nonprofits
- Age
- Geographic location
- Giving history and affiliations, such as:
  - College/School/Campus
  - Grateful patients
  - Volunteers



# Age-Based Segmentation: Stewardship by Generation

- SILENT GENERATION (born before 1946): Prefer personal connection — direct mail, in-person meetings, voice calls. Strong propensity for legacy giving. Lead with relationship.
- BABY BOOMERS (born 1946–1964): 43% of all charitable giving. Respond to personalized engagement around planned gifts and estate planning. Highly loyal supporters.
- GEN X (born 1965–1980): Prefer email, voice, text. Value transparency and outcomes. Average \$732/year in giving. Lead volunteer hours. Show impact clearly.
- MILLENNIALS (born 1981–1996): Avg household giving up 40% (2016–2022). Increasingly make bequests when asked. Prefer digital channels, recurring giving, and storytelling.
- Portal Action: Filter by age range. QCDs only available to 70½+ donors - age filtering is essential for IRA gift cultivation.

# Using Location for Stewardship & Cultivation

- Filter Portal by donor geography to identify who is within range of staff travel, regional events, or existing cultivation trips — then add them to gift officer travel calendars for in-person visits.
- For remote donors, location data surfaces candidates for regional legacy events, virtual stewardship calls, or planned giving webinars in their area.
- Silent Generation and Baby Boomer donors are especially receptive to in-person and voice call outreach — making location-based targeting especially valuable for these age segments.
- Portal Action: Sort by city/state. Tag donors near upcoming travel destinations. Use as input into gift officer portfolio assignments by geography. Build a regional cultivation event calendar around your highest-density donor locations.



# Moves Management: Next Steps for Every Donor

- Moves management means knowing where each donor is in the relationship - and what the next logical step is to deepen it.
- FreeWill Portal provides the data layer. Assign a “next move” to every donor in your portfolio:
  - Attorney connection / estate plan meeting
  - Gift confirmation call
  - Impact story or program update
  - Site visit or cultivation event
  - Legacy society recognition
- Use DonorSearch data alongside Portal data to score each donor on capacity and affinity - focus time on relationships most likely to deepen.
- Segment your portfolio by: gift type confirmed, age/time horizon, wealth capacity, and engagement recency.

# Discounting & Pipeline Valuation

- **Bequest expectancy** = the projected future value of known planned gift commitments. Many organizations calculate using a 5-year rolling average, removing outliers.
- **Valuation factors:** life expectancy (term of gift), expected investment return, payout expenses, and a discount rate tied to projected cost increases.
- The **median estate gift** - not the average - is the more reliable predictor of the next estate gift a charity will receive.
- Apply **probability weights** by designation type: primary bequests carry higher probability than contingent ones when projecting pipeline to leadership.





*FreeWill gives you the data. Stewardship is how you use it.*

# Coming Soon:

## Named Donor Stewardship

Dear Amanda,

Thank you for creating an estate plan and including a gift to Acme. Your generosity has an incredible impact on their future work and planning.

Acme is sharing this message of gratitude with you:

Thank you for your thoughtful commitment to include Acme in your estate plans, and for letting us know. We are truly grateful and honored to celebrate your gift. Your future support will help advance Acme's long-term vision to alleviate poverty and expand opportunity for underserved communities for generations to come.

Because of your legacy commitment, families and individuals facing hardship will experience lasting support, stability, and pathways to a brighter future. We invite you to stay connected in any way you choose, and consider joining our Acme Legacy Society as we celebrate your commitment.

Thank you again for your inspiring support; please contact the Acme Development Team at [help@freewill.com](mailto:help@freewill.com) or Toll Free [1-866-555-1234](tel:1-866-555-1234) with any questions.

Connecting with Acme can ensure your gift is understood and honored exactly as you intended. Please respond to [this survey](#) to give Acme helpful guidance. It allows them to keep you updated on the impact of your gift.

FreeWill provides estate-planning tools to thousands of nonprofit organizations across a variety of different mission areas and locations. Thanks for using FreeWill to support what matters most to you.



Warmly,  
Jenny, FreeWill co-founder & co-CEO

P.S.: If you would like to update your plans, [login to FreeWill today](#).

*Any opinions or communications shared in the box above come from the organization and not FreeWill.*





Thank you.

STAFF PRODUCT MANAGER

Trisha Arora

STAFF PRODUCT MANAGER

Omar Antila

SENIOR DIRECTOR,  
MAJOR AND PLANNED GIVING STRATEGY

Nicole Walton