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STEWARDSHIP ON A SHOESTRING

# Big heart, small budget

April 8, 2026

# Agenda

1. Leveraging existing donor communications + events
2. Utilizing your board + volunteers
3. Optimizing your FreeWill tools and resources
4. Q&A
5. Key takeaways

# 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 Partner Portal)
3. The slide deck can be downloaded below
4. This session is CFRE-approved for 1.0 continuing education credit
5. Posting about the session on LinkedIn? Use #StewardshipSummit

# Meet Autumn!

- Senior Partner Success Strategist at FreeWill (4 years)
- Masters of Public Administration – Nonprofit Management and Leadership from Grand Valley State University
- Previous nonprofit experience in annual fund management, donor communications, board development, and major gift solicitation
- When not helping our FreeWill partners, catch her outside enjoying the beauty of #PureMichigan



SR. PARTNER SUCCESS STRATEGIST  
AUTUMN HUBBARD

# Meet Anna!

- Senior Partner Success Strategist at FreeWill (5+ years), partnering with 250+ nonprofits of all sizes
- Known for a practical, people-centered approach shaped by experience in nonprofit and arts organizations
- Proud alumnae of Pacific Lutheran University (BMA, BAC) and Indiana University (MPA, MA)
- Based in the NYC area and always up for the latest Broadway show 🎭



SR. PARTNER SUCCESS STRATEGIST  
ANNA KOSATKA



Practical strategies to grow donor relations  
without growing your budget

# Key strategy: Build on what you already have planned

Scale your impact without increasing your budget by integrating thoughtful donor touchpoints into your current communications, events, and volunteer networks



# Donor communications and recognition

Effective communication and recognition are the foundation of a lasting stewardship plan—without the high-cost overhead

- **Maximize existing mailings:** Add a quick, handwritten note or Post-it before sending Annual Report or newsletters
- **Heartfelt holiday connections:** Use physical or digital holiday cards to provide a warm touchpoint during the busy year-end season
- **Embrace authentic media:** Share informal photos, stories, or videos, which often feel more genuine and impactful to donors



# Leverage existing communications

- Add all planned gift donors to your current communications stream for emails, newsletter updates, and ongoing annual appeals
- Don't let perfect be the enemy of good – communicate now, customize later



# Leverage existing communications

- Studies show that when a charity communicates with a donor at least once in the two years before their death, **the bequest loss rate drops to 24%**
- Without recent communication, the loss rate nearly doubles to 48%
- **Regular stewardship makes a measurable difference**



# Build events for connection

Stewardship is about conversation, not catering

Create high-impact connections and recognize your donors without breaking the budget

- **Zero-cost legacy recognition:** During events with name tags, identify Legacy Society members and include a "Thank You" slide in pre-event rotating decks
- **Leverage membership perks:** For member-based organizations, offer incentives like a "discount night" or complimentary event access to provide high-value recognition without increasing budget
- **Create community:** No need to add new events – leverage what is already on your calendar! Consider inviting key donors to a pre-event coffee or brief Meet + Greet



# Leverage your champion network

Scaling donor outreach through  
the authentic voices of your most  
dedicated internal advocates

**Leverage peer-to-peer networks:** Encourage supporters to build their own teams and lean into their personal social networks for authentic, grassroots stewardship

Examples:

- **Host thank you parties**
  - Organize dedicated call or writing parties to tackle donor outreach in a social environment with board members and volunteers
- **Involve your community**
  - Have those directly impacted by your mission (i.e., students, program participants, local volunteers, etc) share their gratitude in a simple thank you card



# Tips for success in leveraging your champion network

- **Provide templates:** Supply sample scripts and thank-you notes so volunteers can lead with confidence
- **Protect donor privacy:** Omit specific gift amounts from spreadsheets; instead, provide the general context of the group they are thanking (e.g., "Today we are thanking our monthly donors")



A simple “thank you” can go a long way...





Scaling stewardship  
with FreeWill resources

# Empower your stewardship with FreeWill

Maximize your impact with the high-performance features of your FreeWill partnership. From AI-powered copywriting to a comprehensive library of design assets, these resources are built to help you do more with less.



# Donor insights

- Before contacting a planned giving donor, check the “Insights” panel in the Gift Details of Partner Portal
- Level set expectations about donor responsiveness based on age or family status
- Use source to learn how the donor came to your organization

**Remember:** Donors may not always reply back to you, but they will notice and appreciate you thanking them

Donald Duck

Primary Bequest  
Last Will & Testament

Gift Details  
Gift ID: IQSooRN6

PROJECTED VALUE ⓘ  
**\$500,000**  
Oct 30, 2025

DESIGNATION  
Acme Corporation

DONOR MESSAGE  
*Not specified*

^ Insights 6

💡 **Donald came through your custom FreeWill site.** Check your fundraising database to see if they are an existing member and/or donor. Build on existing relationships with existing members/donors. Introduce new donors to your organization with a welcome message.

💡 **Donald has completed the online portion of their estate plan and may still be in the process of executing it.** Reach out soon to thank them for considering your organization as part of their legacy.

💡 **Donald is under 40 years old.** Younger donors most likely view their estate plan as flexible to change. Establish a relationship, but be aware their gift can change over time.



# William

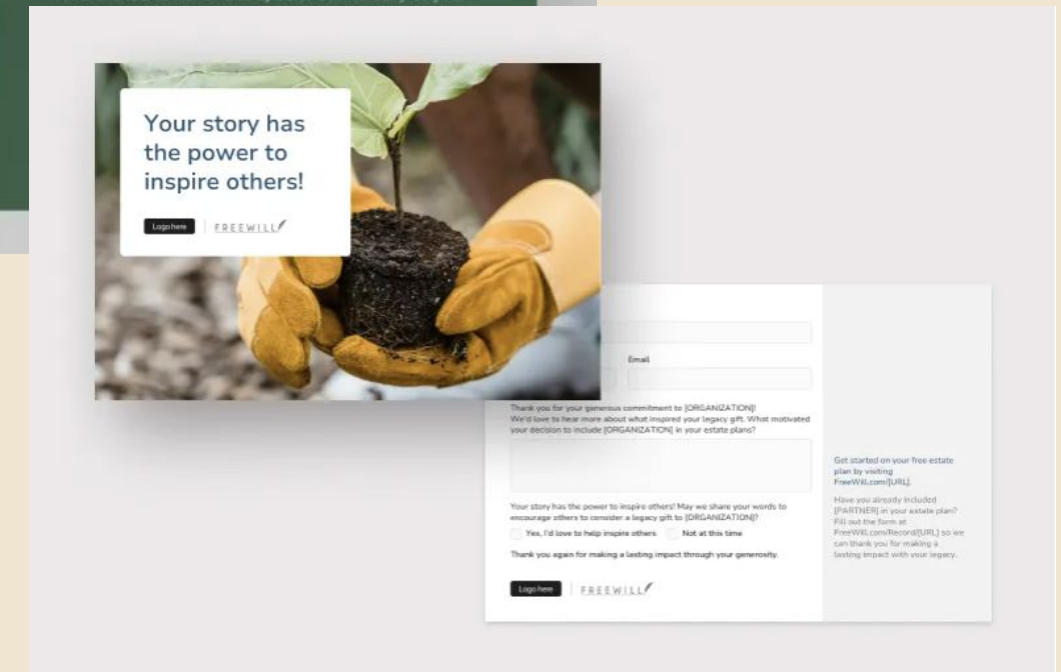
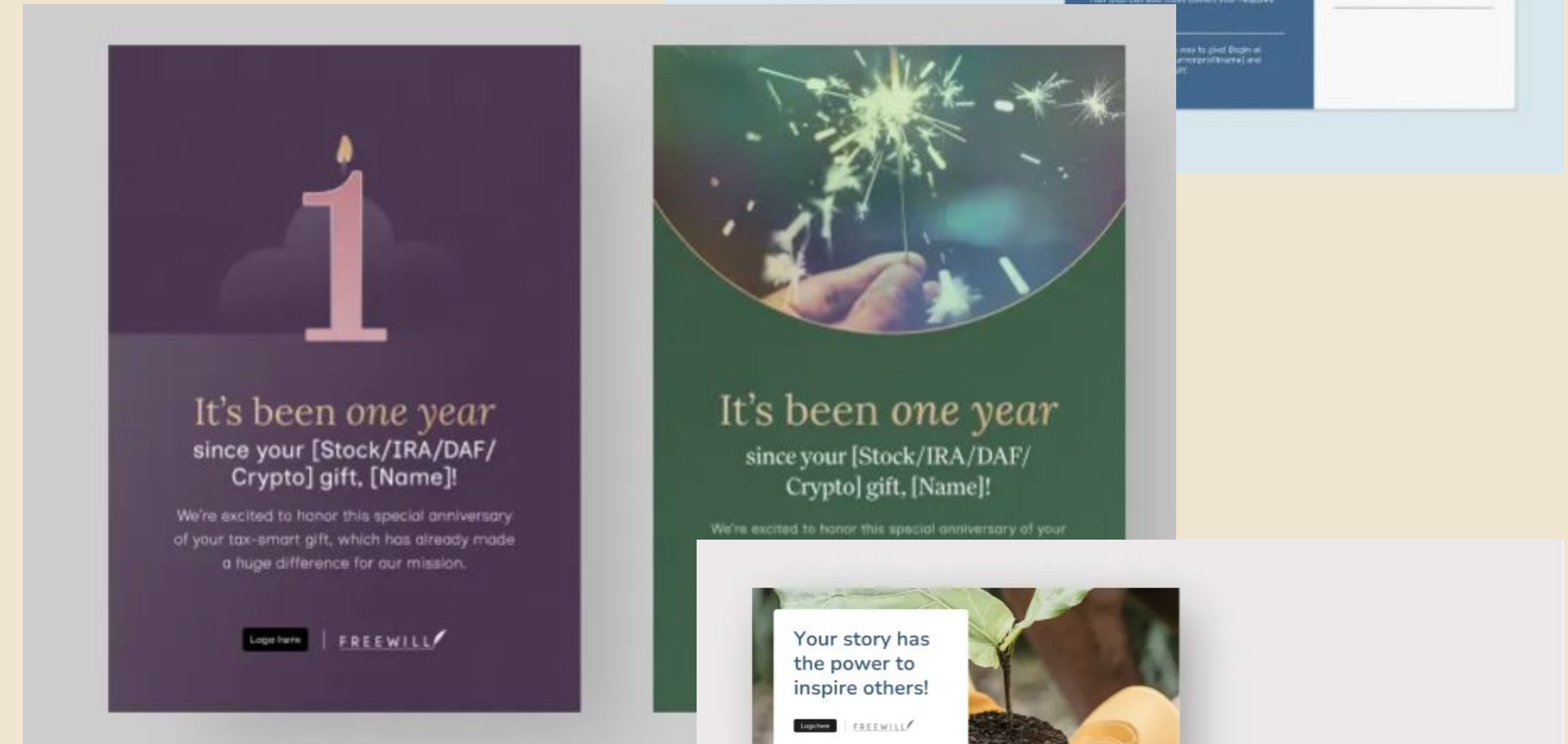
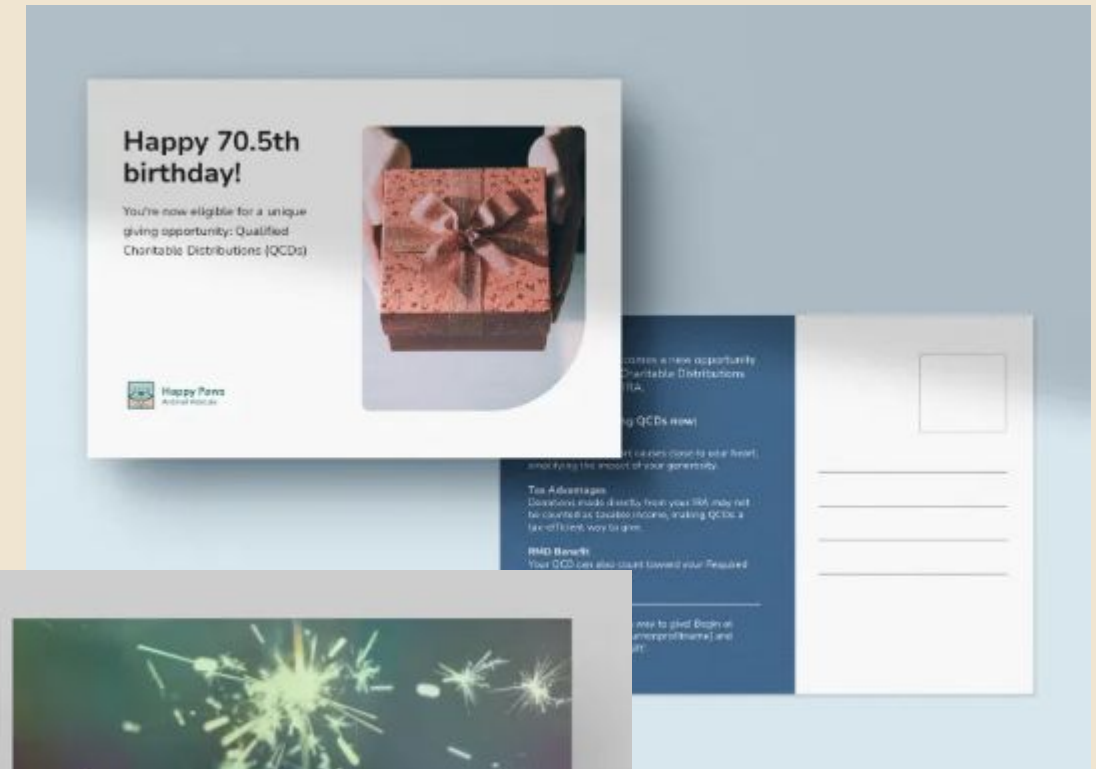
- Use William to overcome writer's block and draft personalized, authentic donor outreach in seconds
- **Tailored Stewardship:** Ask William to refine your message for specific donor segments, or include invitations to “next steps”
- **Efficiency Meets Heart:** Balance the speed of AI with the “Big Heart”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



# Anonymous Donor Stewardship

FreeWill can thank [anonymous donors](#) on your behalf, ensuring every gift is acknowledged even when you don't have the donor's details

- **New Year Check-in:** Verify that this feature is enabled for your team to ensure no donor goes un-thanked
- **Refresh Your Message:** Take a moment to update your automated message to keep it feeling fresh and relevant for 2026
- **Partner Support is Here:** Reach out to [partnersupport@freewill.com](mailto:partnersupport@freewill.com) if you need help enabling or updating this feature

Hi [NAME]!

Thank you for creating your will with FreeWill and including a gift to [ORGANIZATION].

**Because you chose to remain anonymous, [ORGANIZATION] doesn't have your contact information and can't thank you directly.** We're sharing this message of gratitude on their behalf:

Thank you for your thoughtful commitment to support [ORGANIZATION] through a gift in your will. We appreciate your decision to remain anonymous and are honored by your trust in our work.

To learn more about the impact of your support, visit [LINK TO LEGACY PAGE OR WEBSITE], or reach out to our team by:

Email:

Phone:

Your generosity will help ensure a brighter future for children worldwide. Together, we can continue helping kids grow up healthy, learning and safe.



# Stewardship resources

The [Stewardship Hub](#) offers a wealth of resources designed for effective donor stewardship

- Strategic guides
- Ready-to-use templates

Watch expert-led sessions to help you optimize your FreeWill tools

- [Smart Giving Stewardship](#)
- [Planned Giving Stewardship](#)



## Email & text templates, and call scripts (legacy gifts)

With A/B tested language, our customizable email templates help you contact planned gift donors at key milestones. With a 98% open rate, text messaging can increase donor response.

→ Download now



Q&A

# Great questions we've heard from partners:

- Q: We have limited bandwidth, and while these feel like awesome ideas, I'm overwhelmed. What is the bare minimum we can do to see maximum impact?
- Q: Many of the suggestions seem geared towards younger/more “tech-savvy” folks. How can I drive folks to FreeWill/steward them when our list skews older?
- Q: We have a limited budget increase available for this year. What should I spend that on first to increase my stewardship ROI?



# Key takeaways

- **Prioritize authentic stewardship:** High-impact donor relations don't need a big budget. Use existing rhythms (mailings, casual meetings, volunteers) to create genuine, low-cost touchpoints.



# Key takeaways

- **Mobilize your internal champions:**  
Scale outreach by empowering board members and volunteers with clear scripts and support, shifting stewardship from a solo task to a collaborative effort.



# Key takeaways

- **Work smarter with integrated tools:** Maximize efficiency by fully utilizing FreeWill resources like AI-powered William and the Marketing Library which help you deliver professional, personalized recognition quickly.





Thank you!

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