FREEWILL
Donor Stewardship Summit

SENIOR DIRECTOR,
MAJOR AND PLANNED GIVING STRATEGY
Nicole Walton

MANAGING DIRECTOR, GIFT PLANNING AND MARKETING AT HUMAN RIGHTS WATCH
Brian Peterson, CFP, CAP

THE GIFT CONVERSATION

How to talk to donors and their advisors with confidence

April 9, 2026

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Overview

This session will show you how to earn a seat at that table when those opportunities arise. You'll learn how financial advisors, estate planning attorneys, and especially Chartered Advisors in Philanthropy (CAP®) are trained to integrate charitable planning into wealth and estate planning strategies.

Most importantly, we'll show you how to help them do it well. We'll cover ways to build a network of trusted advisors and incorporate a Planned Gift Advisory Council. You'll leave with sample language and tips you can start using immediately to deepen relationships with advisors and unlock more planned and smart gifts for your mission.

This session is co-produced by Estately by FreeWill, an estate planning platform built with financial advisors and clients in mind. It provides the tools and guidance to complete estate plans, seamlessly integrate charitable giving, and ensure legacies advance the causes clients care about most.

Agenda

1. The room you're not in
2. What the advisor is actually thinking
3. What advisors actually need from you
4. Build the relationship before you need it
5. The shift in posture

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

The room you’re not in

Level-setting: The scale of the opportunity

$84T	Transferring from Baby Boomers to younger generations over the next 25 years
$18T	Expected to flow directly to nonprofits during this transfer
~80%	Of the largest charitable gifts are planned gifts, not annual donations
76%	Of high-net-worth investors want philanthropic guidance from their advisor
36%	Actually receive philanthropic guidance; the gap where your opportunity lives
5%	Of advisors proactively discuss planned giving with clients at all

Source: Philanthropy.org / Giving USA / Orr Group / Fidelity Research / Cerulli Associates

What is Estately?

Estately by FreeWill is a platform used by financial advisors to help clients **create, structure, and complete estate plans that include charitable intent**

It helps advisors:

- Move clients from conversations to c**ompleted estate plans**
- Integrate **charitable giving** into core planning decision
- Standardize and scale legacy planning across clients and engage next gen

Why does this matters to nonprofits?

When advisors are involved in philanthropic planning, charitable intent is more likely to become **structured, optimized, and completed**

As estate planning becomes more advisor-led and systematized:

- Charitable decisions are increasingly made **inside advisor workflows**
- Nonprofits are included **based on advisor process, not donor intent alone**
- Many planned gifts are structured **before nonprofits are ever engaged**

Understanding these structures allow for non-profits to engage earlier and more strategically

The room where it happens

The advisor's office is where most estate and charitable plans *actually* take shape. This happens years before a gift is made, often before the donor has even mentioned a specific organization.

What the advisor does is validate and implement the donor's intention within the full context of their financial goals.

If you're not part of that conversation, you're not part of the plan.

Two risks when the GO is excluded

The gift never happens. Nobody raised it. The advisor had no reason to bring up your organization, and the donor assumed someone else would handle it.

The gift happens badly. Wrong vehicle, wrong structure, wrong timing - a gift that creates complications for the donor, the advisor, or your organization.

Advisors aren't blocking your gifts. They're optimizing for their client's full picture. Your opportunity is to become a useful part of that picture.

How the "Room Where it Happens" is changing

What is shifting in the advisor-client conversation?

- Structured instead of ad hoc
- Advisor-led instead of client initiated
- Charitable intent is earlier in the process
- Repeatable across client relationships

What's enabling this shift?

Advisors are increasingly adopting platforms like **Estately by FreeWill** that:

- Bring estate planning into a **standardized, guided workflow**
- Move conversations from discussion to **completed estate plans**
- Integrate **charitable intent directly into the planning process**
- Make legacy planning **scalable across entire client bases**

This is reshaping when and how nonprofits are included in legacy conversations

What the advisor is actually thinking

The Advisor's First Obligation Is to the Whole Plan

Advisors are deeply protective of client relationships. A gift officer who is perceived to be using the advisor's client relationship as a gateway to a gift will get shut out quickly.

Position yourself as someone who helps protect and strengthen the relationship, not someone who wants access to it.

Most advisors have seen a nonprofit mishandle a complex gift. They quietly assume nonprofits can’t manage sophisticated situations.

Your credibility including, basic knowledge of gift vehicles, your organization’s financial stewardship, and clear gift acceptance policies eliminate this assumption before you say a word about it.

Technical credibility is what earns an advisor's trust.

Advisors don’t raise topics they don’t feel ready for

- Only 5% of advisors feel “very confident” discussing philanthropy with clients
- 72% don’t include philanthropy in initial fact-finding, and half blame a lack of training
- When advisors aren’t sure how a charity handles complex gifts, policies, or gift-acceptance logistics, they’re more likely to change the subject

Opportunity: Solve their competence problem before the client situation arises.

Source: Wealth Management

No language for the conversation

Even willing advisors may not know how to raise charitable planning with a client. It can feel presumptuous, awkward, or like overstepping.

A gift officer who hands an advisor a simple, natural question to use with clients is providing genuine professional value.

"When you think about the assets you've built, is there a cause or organization that's been important to your family that you'd want to be part of your legacy?"

Give them the words. Make it easy.

Source: Leave10.org

The AUM problem - Financial Advisor

Assets Under Management (AUM) fees mean that assets flowing out of a portfolio - even to charity - can represent a reduction in an advisor's compensation.

This isn't greed. It's a structural reality. Most advisors don't consciously suppress charitable conversations because of it - but it shapes the culture of the conversation.

Advisors are increasingly incorporating **philanthropic financial advising,** integrating charitable giving legacy planning into broader wealth conversations

"78% of advisors see philanthropy discussions as business-enhancing"
https://tpi.org/news_tpi/advisors-clients-talking-more-about-charitable-giving/

Acknowledging this openly, rather than pretending it doesn't exist, builds trust with advisors.

Source: Wealth Management; ThinkAdvisor

Lead relationship with "mission and impact," not gift vehicles

- Don't lead relationship-building with conversations abount technical tools of planned giving (CRATs, CRUTs, DAFs, etc.
- Be an expert in your mission
- Leverage your relationship-building skills to make meaningful introductions
    - When listing advisors for consideration, you have more to go on

Lead with the donor's goals, not the vehicle. Be an expert in the mission and the relationship, not gift vehicles.

What Advisors actually need from you

The WIIFM for Advisors

Engaging clients on philanthropy leads to better outcomes:

- **Client Satisfaction:** 87% report higher satisfaction, 85% greater trust, and 88% are more likely to refer
- **Advisor Success:** 92% of advisors who help with philanthropic planning see positive business outcomes
- **Relationship Impact:** Philanthropy "creates continuity, introduces family members, opens values-based conversations, and turns episodic planning into an ongoing relationship”

Source: T. Rowe Price, *Advisor Engagement in Charitable Giving Among High-Net-Worth Investors*, 2026.

The WIIFM for Advisors

- Philanthropy creates continuity. It introduces family members. It opens values-based conversations. It turns episodic planning into an ongoing relationship.
- The advisor who incorporates charitable planning is a better advisor. The gift planner who helps them do it is their most valued nonprofit partner. That's the relationship you're building.

What advisors actually need

Simplicity - reduce friction

Have a one-page advisor reference guide (not a mission brochure): gift acceptance policies in plain language, sample bequest language, DTC info, direct contact. Make yourself the easiest call they'll make all week.

A person, not an institution

Advisors refer people they know and trust. Institutional outreach almost never produces referral relationships. Be a specific individual they've met and found genuinely useful.

Not to look uninformed

Pre-solve their competence problem. Give advisors a framework for discussing charitable options before they need it. Consider offering CE/CLE credit opportunities.

To be the hero to their client

When your knowledge helps an advisor bring a powerful idea to their client - an idea the client loves - you have given that advisor something money can't buy. They will call you again.

Values-first language

When advisors do raise philanthropy with clients, most focus on the mechanics - the vehicle, the tax treatment, the structure. Research consistently shows clients want something different.

Coach advisors on a simple shift: lead with the client's values and motivations before introducing any vehicle.

"What legacy do you want to leave?" opens a very different conversation than "Have you considered a DAF?"

The gift planner who teaches advisors this shift earns durable credibility.

Source: [Talking Planned Giving: Words that Work]

Build the relationship before you need it

Start where you are

Start with what you already have

1. Audit your current donors: who are their advisors? These are warm entry points.
2. Look at your board and volunteers: who is already an estate attorney, financial advisor, or CPA?
3. Review existing estate files for attorneys who've already helped facilitate bequests

Get into the right rooms

Estate planning councils, Financial Planning Association chapters, bar association sections - these are where advisors who care about planning gather.

Show up consistently. Be useful. Never pitch

Your goal: Become a known, trusted resource in your professional community – not to find the next gift.

The Planned Gift Advisory Council

What it is

A volunteer council of professionals - estate planning attorneys, financial advisors, CPAs, trust officers - who advise on planned giving strategy, help educate donors, and serve as ambassadors for your mission.

Not a governing board. Not a sales channel. A group of aligned professionals who care about your mission.

Why it's powerful

Concentrates a trusted network who can flag opportunities when a client's goals align with your mission. Creates structured donor education. Gives advisors a professional development benefit.

Charter: define purpose, criteria, term limits, and ethical boundaries. Clear conflict-of-interest standards. Value exchange for both sides.

Closing: The shift in posture

Practical tools + sample language

Practical tools to offer advisors:

- One-page professional reference guide (policies, sample language, contact)
- Simple language to raise charitable planning with clients
- A direct phone or email - a person, not a department
- Willingness to join a three-way conversation when appropriate

Sample outreach email:

"Several of our donors are working on multi-generational and charitable plans, and your perspective is crucial. I'm building a more intentional approach to charitable planning and would value 20 minutes to learn how we can better support your work with clients who care about [cause area]."

Your action steps for the next 1–2 months

- Identify 5–10 advisors in your ecosystem - donors' advisors, board members, known estate planning professionals. Schedule introductory conversations.
- Draft or refine a one-page "For Professional Advisors" resource: mission info, gift acceptance highlights, sample language, direct contact. Get leadership sign-off.
- Attend one estate planning council, FPA chapter, or bar association event in the next 30 days. Show up with no agenda.
- Outline a basic Planned Gift Advisory Council concept - purpose, 8–10 target members, meeting cadence - to share with your CEO or development committee.
- Write down two or three advisors you already know. Reach out this week with no ask. Just listen.
- Review recent FreeWill bequest notifications. Identify donors whose situations may benefit from an advisor introduction.

The advisors who become your strongest partners are not the ones you convinced. They're the ones you served.

Thank you.

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