



CASE STUDY | PLANNED GIVING

How the College of Saint Benedict unlocked large estate gifts from small-dollar donors

Challenge

The planned giving team at the College of Saint Benedict was receiving an average of 15 new bequest commitments per year, and were hungry to up their impact.

They were entirely focused on their highest level prospects, but knew there was a huge additional opportunity if they were able to expand their reach. However, their small team didn't have the time or resources to start planned giving conversations with their most loyal supporters: small-dollar donors. So they started looking for an easy, cost-effective way to engage these alumni.

Solution

With FreeWill, the planned giving team found a way to reach more of their community. They tapped into FreeWill's resources to produce marketing materials and emails that positioned estate planning services as a gift to alumni and created a sense of urgency around making a will.

This freed up their time to continue focusing on their top prospects while still speaking to a wider audience. And in less than 10 months, they had brought in an additional 15 new bequest commitments from small-dollar donors, totaling more than \$800,000.



Results

 **15** New bequests in <10 months

 **\$800K** Small-dollar donor bequests

“FreeWill has exceeded expectations by helping us reach out broadly to donors and uncover estate gifts in the \$35,000 range.”

- Heather Pieper-Olson, Associate VP of Institutional Advancement