

FREEWILL PARTNER TRAINING

# Smart Giving Solutions (104)



# Smart Giving Certificate



Our optional certificate program is offered to FreeWill partners at no cost

Complete these requirements to receive a Certificate of Completion and an invitation to add the accomplishment to your LinkedIn profile

- Smart Giving Basics (101)
- Smart Giving Marketing (102)
- Smart Giving Conversations (103)
- Smart Giving Solutions (104)
- Smart Giving Stewardship (105)
- Final online quiz



Eligible for 5.0 CFRE continuing education credits



# Agenda

- 01 How FreeWill's smart giving tools help donors and your nonprofit
- 02 Talking points to encourage donors to use the tools for giving
- 03 Live demos of the smart giving tools
- 04 Next steps



01

How the smart giving tools  
simplify giving for donors  
and your nonprofit



## SMART GIFTS

### **Real-time gifts**

that have an immediate  
impact on your mission

Gifts of appreciated securities

Qualified charitable distributions from IRAs

Grants from donor advised funds

Gifts of cryptocurrency



## Smarter ways to give

Nonprofits who invest in non-cash giving grow their fundraising revenue at a rate of **5x-6X** those that don't

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**97%** of a donor's wealth is likely held in assets

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Donors can enjoy significant **tax savings** by making a smart gift



# Smart gifts can be challenging

What are the challenges?

These gift types are often unfamiliar to donors, who might not know the tax benefits, and may be unsure how to give in this way

The traditional giving process can be (or appear to be) burdensome or intimidating – finding the right forms, calling the broker / plan administrator for support, tracking down your nonprofit's info

Each broker's / administrator's process is different, so it's hard to offer clear next steps

Many nonprofits receive these gifts with no associated donor information attached – so they can't acknowledge or steward those gifts



# FreeWill creates solutions

How do FreeWill's products solve for these challenges?

- Built-in donor education about smart gifts
- Customized landing page designs that feel like a natural extension of your website
- A warm, intuitive user experience that leads the donor through the process step-by-step
- Facilitation of gifts from industry's top brokers & plan administrators and dozens of cryptocurrencies
- Prompt reporting of gifts initiated or completed
- Data on the effectiveness of your FreeWill smart giving outreach





# Donor education



## Qualified Charitable Distributions

Qualified Charitable Distributions (QCDs), also known as IRA Charitable Rollovers, are the savviest way for individuals age 70½ or older to use their IRAs to maximize their charitable impact.

I want to learn more about QCDs.

To learn more about QCDs and why they are a great way to give, visit the link provided below.

[Learn more about QCDs](#)

## A brief guide to Qualified Charitable Distributions

### What are Qualified Charitable Distributions?

Qualified Charitable Distributions (QCDs) are distributions from your Individual Retirement Account (IRA) made directly to a qualified nonprofit organization without having the distribution counted as taxable income.

QCDs are also sometimes referred to as IRA Charitable Rollovers.

Currently, up to \$100,000\* in IRA funds can be counted as QCDs annually. For married couples, each spouse can make QCDs up to the \$100,000 limit for a potential total of \$200,000.

\* The amount that donors can give to charity via QCD will increase by a percentage in 2024 to account for inflation.

### Who is eligible?

If you are 70½ years of age or older and have a Traditional IRA, you are eligible to make a QCD using FreeWill.

### What are the benefits?

#### QCDs can reduce your income taxes

Normally, funds that are distributed from a Traditional IRA are includible in your taxable income, which is likely to increase your overall tax burden. In some cases, this additional income may also move you into a higher tax bracket.

However, QCDs are an exception to this rule—funds go directly from your IRA to your chosen charitable organization without going to you first, thereby lowering your adjusted gross income and effectively reducing your income taxes.

#### QCDs can satisfy Required Minimum Distributions

Required Minimum Distributions (RMDs) are amounts that you must withdraw annually from your Traditional IRA once you're eligible (as of 1/1/2023, the age to start taking RMDs increased from age 72 to age 73, with the exception of donors who turned 72 before January 1, 2023).

If you do not withdraw your RMD, you will face a penalty tax of 25% of the required withdrawal amount. QCDs can be used to meet this RMD requirement and avoid penalties.

[Read more about RMDs on the IRS website](#)



# Custom landing pages

When you join the American Kidney Fund's fight, you change lives. You help us empower people to prevent kidney disease and slow its progression. You make lifesaving health care affordable and accessible for patients. You support innovations in education for patients and professionals. And, you promote advances in nephrology research. 97 cents of every invested dollar makes a difference as we are the most efficient, highest-rated national kidney nonprofit in the United States.



## Qualified Charitable Distributions

Qualified Charitable Distributions (QCDs), also known as IRA Charitable Rollovers, are the savviest way for individuals age 70½ or older to use their IRAs to maximize their charitable impact.

Whether you want to make a QCD gift to the American Kidney Fund today, request a tax acknowledgment letter for a gift already made, or just learn more about QCDs, you can find resources for each below.



Progress bar: 1 DONOR INFORMATION, 2 DESIGNATION, 3 GIFT DETAILS, 4 REVIEW, 5 COMPLETE

### Donor Information

Required fields are marked by an asterisk

☐ The gift is on behalf of a company ☐ I am a financial advisor acting on behalf of a client

What is your full legal name? What name should I use?

First name\* Middle name Last name\*

Preferred name

What is your email address? Why do you need an email address?

What is your phone number? Why do you need a phone number?

10 digits, U.S. only, for example (999) 999-9999.

(999) 999-9999

What is your address? Why do you need an address?

Happy Paws Animal Rescue  
101 Dalmatian Drive  
Acton, MA 01720  
EIN 12-3456789

Happy Paws has partnered with FreeWill to accept and process this type of donation. [About FreeWill](#)

How do Donor-Advised Fund (DAF) grant requests work?


Provide your contact information, tell us about your gift, and submit your grant request securely online.

**No added fees.** Skip unwanted service fees and make the most out of your contribution. Standard administrative fees may still apply.

**Secure and encrypted.** We never ask for or store sensitive financial information. [Security Policy](#)




# Smart giving landing page

 acme.org

## Maximize your impact

Join Acme in creating a positive change in the world. Your donation can help make a tangible difference in the lives of individuals and communities.

Receive tax benefits and make the most of your contribution by donating non-cash assets.



Stocks or other securities

Cryptocurrency


Donor-advised Fund (DAF)


Individual Retirement Account (IRA)


### Donating stock and securities doesn't have to be complicated.

When you donate securities, you make an outsized impact without taking money directly out of your bank account. Plus, neither you nor Acme will be taxed on the gains for appreciated assets you donate.

Donate stock today

Powered by 

 Done in under 10 minutes

 Secure and encrypted

#### How it works

1. Provide your contact information and donation details, such as: brokerage name, account number, stock name, and number of shares
2. Confirm your email
3. Submit your documents securely online through DocuSign or choose to print and mail the completed forms yourself

#### What happens next

Your brokerage will transfer your securities directly to ours. You'll receive an acknowledgment for tax purposes once we receive the securities.



# Intuitive user experiences

ABOUT YOU

GIFT DETAILS

PERSONALIZE

REVIEW

SIGN

## Review your gift details

FreeWill uses DocuSign to allow you to securely input your information and sign your documents electronically. You will not be able to edit your documents once the DocuSign process is completed.

### Your information

LaurenTEST Winther-HansenTEST  
lwinther-hansen@freewill.com  
(202) 555-1212

123 Test St,  
Annapolis, MD 21401

[Edit](#)

SECURITY	CURRENT VALUE
SBUX	\$5002.00
50 shares	<a href="#">Edit</a> <a href="#">Delete</a>

+ Add stock, bond, mutual fund or other security

### Designation

ACME  
Area of Greatest Need

[Edit](#)

### Message

You helped my family in 2005. I'm honored to support your important work.



# Top brokers & custodians

Donor Information

Designation

Gift Details

Review

Complete

Gift Details

What is the name of your financial institution?  

Select a brokerage

What type of account do you have?  
☐ Individual  
☐ Joint

Add securities and shares to your gift\*  
Donors generally incur the greatest tax benefit when donating stock that has been held for more than a year. Please contact your brokerage if you have any questions.  
[Estimate total donation amount instead](#)

Security\*

Shares\*

Est. value

Search securities

-

0

+

\$0.00

[Add external purchase information](#)

+ Add another stock or security

ACME

ACME  
1234 Main Street  
New York, NY 10001  
EIN 12-1234567

ACME has partnered with FreeWill to accept and process this type of donation. [About FreeWill](#)

How does donating stock work?

Donor Information

Designation

Gift Details

Review

Complete

Gift Details

Confirm you meet eligibility requirements\*  
☒ I confirm that I was born before September 19, 1954 and am giving from a traditional IRA account Can I give from a Roth or inherited IRA?

Which custodian is your traditional IRA with?\*  

Select a custodian

Estimate your Required Minimum Distribution (RMD) (optional)  
The RMD is the smallest amount certain individuals must distribute from their IRA each year. Whether you are subject to the RMD and the specific amount of the RMD depends on your age. [Learn more about RMD eligibility](#)

Begin RMD Estimate

How much would you like to donate from your IRA?  
The IRS allows up to \$108,000 in QCD donations from an IRA. Any amount above this limit will not qualify as a tax-free QCD.

\$

Happy Paws

Happy Paws  
101 Dalmatian Drive  
Acton, MA 01720  
EIN 12-3456789

Happy Paws has partnered with FreeWill to accept and process this type of donation. [About FreeWill](#)

How do Qualified Charitable Distributions (QCDs) work?

DAFpay™

Select your provider  
Express checkout with your Donor Advised Fund

Search for thousands of providers

Fidelity Charitable

Schwab Charitable (DAFGiving360)

Vanguard Charitable

The Donors Fund

J.P. Morgan Private Bank

What is a Donor Advised Fund?

Names & logos are shown to identify your provider & do not indicate endorsement or sponsorship.



# Prompt reporting

Great news! Columbia University has received a new stock gift that requires your review.

1  
Stock Gift(s)  
\$10,000  
Estimated Value

[View Details in Portal](#)

## Next Steps:

1. Review the gift's status and estimated transfer date — [learn more](#) about gift status
2. Thank the donor (and financial advisor, if listed) for their incoming gift — [download email templates](#)
  - ↳ If the gift is **not** in transit remind them to complete the transfer (i.e. submit paperwork, call brokerage, etc.) by the transfer date listed.
  - ↳ To ensure you can easily match received stock gifts to the correct donor, we recommend confirming the transferred asset and number of shares
3. Update gift Status to **Received** once funds are received

If you have any questions, please [Reply](#) to contact our Partner Support team.

## Gifts Smart Gifts

[Smart Gifts](#) [Crypto Cause Funds](#) [Removed Gifts](#)

FILTERS							
ADD GIFT							
STATUS	ENTRY DATE	ASSET TYPE	VALUE	DESIGNATION	DONOR	LOCATION	SOURCE
In transit	Mar 7, 2025	DAF	\$5,000.00	Acme Public	Timothy McClelland prof. Timothy	Morrow, TX	/stocks/happypaws
In transit	Mar 3, 2025	DAF	\$50.00	Acme Public	Electra Webb Tortorella	SALISBURY, CT	Unknown
In transit	Feb 28, 2025	DAF	\$5,000.00	Acme 2	REBEKAH COTTON	Acworth, GA	/smartgivinglacme
Started	Feb 6, 2025	Stock	Unknown	Acme Corporation	Ryan Powell prof. Ryan	adidas, CO	/stocks/acme
In transit	Jan 9, 2025	DAF	\$1,000.00	Acme Public	Nellie Gamble		/tafacme
In transit	Jan 8, 2025	Stock	Unknown	Unknown	Einar Rocky Huel Bergstrom prof. Einar	Hoffman Estates, NE	/stocks/acme
Received	Dec 26, 2024	DAF	\$123.00	Acme 2	Emilio Barreiro	Glendora, CA	/tafacme
In transit	Dec 12, 2024	Stock	\$25.13 (443) 2 (shares) (DAF)	Acme 2	Testy Tester	Sea Shore, AK	/smartgivinglacme
In transit	Dec 12, 2024	Stock	\$543.90 (443) 25 (shares) (DAF)	Acme 2	dutyfighly fchvgkhj	gyeurahtwjkim, AK	/smartgivinglacmelstax
Started	Dec 12, 2024	Stock	\$543.90 (443) 25 (shares) (DAF)	Acme 2	test test	ctryubh, HI	/smartgivinglacmelstax
Started	Dec 12, 2024	Stock	Unknown	Acme 2	Vivian Marlen Douglas Heide... prof. Clara Hauck-Swift	Belleville, MO	/stocks/acme
In transit	Dec 9, 2024	Stock	\$485.68 (443) 2 (shares) (DAF)	Acme 2	Michael Michael	Chapel Hill, NC	/smartgivinglacme

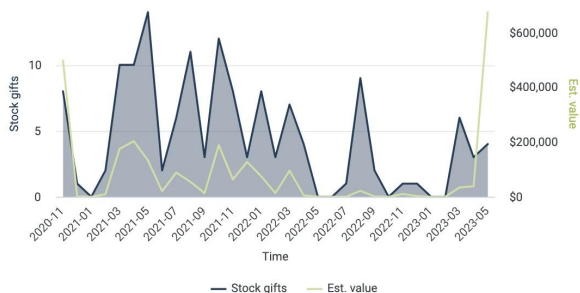
## Requests

STATUS	ENTRY DATE	REQUEST TYPE	NAME	EMAIL	PHONE
Incomplete	May 31, 2023	Tax acknowledgement	Lauren TEST Winther-Hanse...	lwinter-hansen@yahoo.com	(410) 555-1212
Incomplete	Apr 20, 2022	Information request	Test Test	jparsons122+test@gmail.com	(281) 330-8004
Incomplete	Jul 12, 2021	Information request	Brianne TEST Thompson-Ma...	brianne@freewill.com	(201) 742-3306
Incomplete	Jun 9, 2021	Information request	Wendy Irving	irving@buffalo.edu	(716) 881-7484
Incomplete	Apr 1, 2021	Information request	Barbara Haramis	bharamis@ctf4ids.org	(732) 998-1431
Incomplete	Mar 31, 2021	Information request	Kim Kosa	kimberlykosa@gmail.com	(617) 513-3546
Complete	Nov 10, 2022	Information request	Salchicha Myung	jinjennyshin+chachastock@gmail.com	(201) 351-4654
Complete	Sep 23, 2022	Information request	Emilio Alejandro Barreiro	emilioar006+1@gmail.com	-
Complete	Oct 8, 2021	Information request	Oogi Myung	jinjennyshin@gmail.com	(201) 555-5555
Complete	May 12, 2021	Information request	Madeleine Novack	madeleine203482@gmail.com	(201) 572-8395
Complete	Feb 11, 2021	Information request	Carla Robinson	carla@lsaf.org	-
Complete	Feb 9, 2021	Information request	Ellen M Miller	EMiller@marian.org	-
Complete	Jan 29, 2021	Information request	Reina Gabai	reinalgabai@gmail.com	(609) 968-3963



# Data & analytics

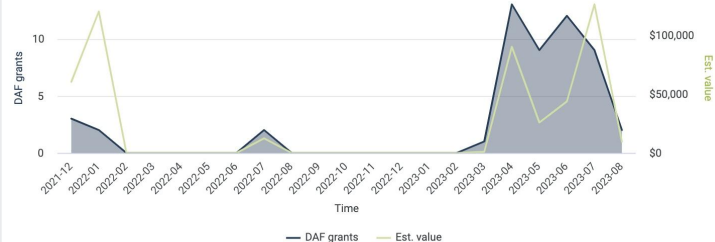
Stock gifts over time



Campaign performance summary (beta)

UTM campaign	UTM medium	Entry path	Traffic	Total stock gifts	Stock gifts completed	Est. value
1		/acme	4,709	3	1	\$28,692
2		/stocks/acme	4,059	136	103	\$1,645,957
3		/qcd/acme	1,514	3	2	\$22,441
4		/smartgiving/omar	16	0	0	\$0
5	omartest	/smartgiving/acme	3	0	0	\$0

DAF grants over time



Campaign performance summary (beta)

	UTM campaign	UTM medium	Entry path	Traffic	Total DAF grants	Est. value
1			/acme	4,709	1	\$1,234
2			/stocks/acme	4,059	8	\$15,130
3			/qcd/acme	1,514	5	\$9,033
4			/daf/acme	161	6	\$46,610
5	acme_homepage-c...	fwpg	/acme	147	1	\$2,550
6	cdcfoundation_web...	website	/daf/acme	1	1	\$12,345



02

Talking points to encourage  
donors to use the tools for giving





# Why should donors use your smart giving products to make their gift?

These online tools:

- Are easy to find on your organization's website when the donor is ready to give
- Save the donor time and simplify the giving process
- Easily facilitate gifts from all top brokers / custodians
- Enable financial advisors to give stock on behalf of clients
- Ensure donors are properly credited and acknowledged for their gifts
- Alert you that a gift is on its way, so you can quickly credit and acknowledge the donor when it arrives
- Save your organization time and energy matching contributions with the initiating donor



# Talking points

- *“Ready to give from your IRA? Please use our online tool to initiate the process. It will pre-populate the correct form for your plan administrator so you can easily mail it in. We’ll be on the lookout for your gift and will send you a receipt promptly.”*
- *“To give stock, use our easy online tool. We’ll know your gift is on its way and can send you a receipt promptly, so you get the tax savings you deserve.”*
  - *“If you’d like to work through your own broker, invite them to use the online tool on your behalf, or access our transfer information [here](#).”*
- *“To give from your DAF now, use our online tool so we can properly credit and thank you when the grant arrives.”*
- *“Use our easy online tool to donate crypto and support our important work.”*

Also, ask the donor for feedback on the tool’s ease of use!



# 03

## Exploring the smart giving tools



# Qualified Charitable Distributions with FreeWill

Demo site: [freewill.com/qcd/happypaws](https://freewill.com/qcd/happypaws)



# Stock Gifts with FreeWill

Demo site: [freewill.com/stocks/happypaws](https://freewill.com/stocks/happypaws)



# Donor Advised Funds with FreeWill

Demo site: [freewill.com/daf/happypaws](https://freewill.com/daf/happypaws)  
Use these credentials: good-user | password123



# Crypto Gifts with FreeWill

Demo site: <https://www.freewill.com/smartgiving/acme/crypto/donor>



# 04 Next steps





## LOOKING AHEAD:

# Next steps

1. Complete the [post-training survey](#)
2. Use the links shared throughout this presentation to test the user experience for yourself
3. Bookmark your nonprofit's smart giving landing page so you can find it easily (Note: all your custom pages are linked on the homepage of Portal)
4. Draft and practice your talking points so you can confidently encourage donors to use your smart giving tools



# Thank you!

**Lauren Winther-Hansen**  
Nonprofit Training Lead

E. [training@freewill.com](mailto:training@freewill.com)

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