

How to Position Your Nonprofit for the Wealth Transfer

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As highlighted in the recent Chronicle of Philanthropy article [*“How to Position Your Nonprofit for the Wealth Transfer”*](#) nonprofits that want to benefit from the upcoming wealth transfer should continue to make planned giving as easy as possible for their donors.

FreeWill is one tool that can help your organization do just that. Below are key talking points and insights from the article to guide discussions on maximizing this moment for nonprofit success.

KEY TAKEAWAYS

1. Encourage Estate Planning

Nonprofits should actively engage donors in estate planning discussions. By being part of these conversations, charities can position themselves as potential beneficiaries. Tools like FreeWill simplify this process, making it easier for donors to include charities in their plans.

2. Focus on Percentage-Based Gifts

Asking donors for a percentage of their estate rather than a fixed dollar amount aligns with their financial uncertainties and ensures flexibility. This approach provides psychological comfort while potentially increasing the size of the gift as assets grow over time

3. Include Small Gift, Repeat Donors

Even modest donors may leave significant estate gifts due to accumulated assets like real estate. Charities should maintain relationships with all donors, regardless of their current giving levels, as their estates may hold unexpected value.

4. Collaborate with Estate Planners and Financial Advisers

Building relationships with advisers who guide donors through estate planning is crucial. These professionals can recommend nonprofits as beneficiaries when they understand the organization's mission and impact.

5. Focus on Women and Next-Generation Donors

Women's wealth is growing rapidly, and they are more likely to consider charitable giving. Additionally, engaging younger generations who will inherit wealth ensures continuity in philanthropic support across family lines.

By implementing these strategies, nonprofits can better position themselves to benefit from the Great Wealth Transfer while honoring donor intentions.

Bonus Tip

Appeal to Donors' Desire for Permanence - Endowments and Named Opportunities

Many donors want their legacy to endure after their lifetime. Nonprofits can attract large estate gifts by offering opportunities like endowed funds or naming rights that provide a sense of permanence and honor the donor's wishes.