

What is the Stewardship Campaign?

Donor stewardship is **the relationship building process** that occurs after a donor makes a gift. For many organizations, the first step in donor stewardship is **having the donor verify their planned gift.**

Many partners have expressed gift verification as a pain point in their partnership, **The Stewardship Campaign will help:**

- Confirm Planned Giving donors from FreeWill's platform
- Share a bequest given to your organization outside of FreeWill

Your next step? Talk with your FreeWill Strategist to set dates for outreach and receive content!



Audience and Timing

Audience: This campaign will help *confirm* gift intentions from donors. We recommend using the campaign for **planned giving prospects** and **major donors** to confirm any unknown or suspected gift intentions.

Timing: Whenever! This campaign is not time bound. It can work as a standalone campaign or as a targeted segment of an existing FreeWill campaign.



Campaign Components



Two-Part Email Series

Reach out to your planned giving donors to confirm gift intentions using a two-part email series highlighting the Gift Intent Form.



William Integration

For 1:1 donor outreach, use the *Individual Planned Gift Stewardship* prompt to help craft a message tailored to them.



Additional Resources

On the Marketing Library, you will find a Content Center (with email signatures, postscripts, and newsletter integrations) as well as a training video discussing these resources more in depth. You can also visit the [Stewardship Hub](#) for more resources.

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