



# Stewardship Email Series

## Gift Intent Form Sample Email

*Below, please find a two-part email series sharing the **Gift Intent Form** with Planned Giving donors to allow them to verify their gift.*

*This is an example only. In order to receive your email(s) and Tracking Link(s), please request a customized version from your Strategist.*



## Initial Email

### Subject Line Options:

- This will only take a minute, [NAME]
- Define your legacy with [ORG]

### Body:

Dear [NAME],

On behalf of everyone at [ORG], I want to extend our heartfelt thanks for your generous support of our work. Because of your incredible gift in your will, you have helped us make significant strides in [IMPACT AREAS], and we deeply appreciate your role in helping us fulfill our vision for the future.

To help us better understand your intentions and ensure your gift is distributed according to your wishes, please fill out our **Gift Intent Form**. This form allows you to share your vision for how your gift will help shape the future of [ORG]. You can share your contact information or remain anonymous, and you can update your information at any time.

[Record my planned gift](#)

By confirming your legacy gift, we also extend an invitation to join [LEGACY SOCIETY]. Members of [LEGACY SOCIETY] are like-minded individuals who are setting the foundation for our work well into the future. Benefits include: [LIST 2-3 BENEFITS OF JOINING THE LEGACY SOCIETY].

Thank you again for your dedication and for being a key part of our community. If you have questions about other legacy giving options, please do not hesitate to contact us.

Warmly,

[SIGNATURE]

P.S. Are you looking to begin your legacy with [ORG]? Begin your will with FreeWill today and include a gift to [ORG].



## Follow-up

**Subject:** Your Legacy, Our Future

**Body:**

Dear [NAME],

**Have you let [ORG] know of your gift?** Your generosity continues to make a meaningful difference in [IMPACT AREAS], and we're so grateful to have you as a part of our community.

Filling out the Gift Intent Form only takes a minute, and you can help honor your wishes while planning for the future. Legacy gifts help secure our mission for generations to come while also ensuring your values and impact can live on.

[Record my planned gift](#)

By confirming yours, you'll also be invited to join [LEGACY SOCIETY] — with benefits like [BENEFIT 1] and [BENEFIT 2].

Thank you for all you do to support our work and future.

Warmly,

[SIGNATURE]

**P.S.** Want to start your legacy today? Make your will for free with FreeWill and include a gift to [ORG].