

Evergreen Planned Giving Suite Talking Points



FreeWill offers online self-help solutions for common estate planning needs and related educational content. Estate planning may implicate both state and federal laws, and estate planning needs will differ based on personal circumstance and applicable law. FreeWill is not a law firm and its services are not substitutes for an attorney's advice. The information here is provided for educational purposes only and is not intended to provide, and should not be construed as providing legal or tax advice. This information is general in nature and is not intended to serve as the primary or sole basis for investment or tax-planning decisions.

Estate Planning & Legacy Giving: Key Talking Points

Why an Estate Plan Matters

- Everyone, regardless of age or wealth, should have a will or living trust. With a valid estate plan, you decide who inherits your property, who will care for your children or pets, and who will handle your affairs.
- Estate plans provide clarity, save time and stress for loved ones, and offer peace of mind knowing your wishes will be honored.
- You can also leave a charitable gift in your will, ensuring your legacy continues to support the causes you care about.

What's in an Estate Plan

An estate plan typically includes:

- A **will or living trust** to list property, appoint guardians, and name an executor
- An **advance healthcare directive** to make your medical wishes known
- A **financial power of attorney** to manage finances if you become unable to
- **Beneficiary designations** for assets like retirement accounts and life insurance policies
- **Funeral wishes** and other specific instructions

Before and After You Create Your Plan

Before:

- Collect all of your assets (e.g. real estate, bank accounts, digital assets, personal property, pets, retirement accounts, life insurance policies, etc).
- Discuss your wishes with loved ones
- Decide who will serve as executor or guardian
- Determine what causes you may want to support with a gift in your will



After:

- Print your will and sign it in front of witnesses to ensure it's legally valid (FreeWill gives you detailed instructions on how to do so in your State!) If you live in Louisiana or you've elected to create a self-proving affidavit alongside your will, be sure to coordinate notarization.
- Sign and store your documents safely, notify your executor, and review your plan every 3–5 years or after significant life changes.

Legacy Giving

A gift in your will to [PARTNER] costs nothing today while having a lasting impact on [MISSION]. It helps sustain [PARTNER]'s work for generations. FreeWill makes it easy to include this kind of gift, and those who do may join our [LEGACY SOCIETY NAME] of forward-thinking supporters.

About FreeWill

FreeWill is a free, easy, and legally valid online tool that helps you create your will in under 20 minutes. Since 2017, it has inspired hundreds of thousands of people to protect their loved ones and raised over \$13 billion for nonprofits.

- Valid in all 50 states and D.C.
 - Secure and private—no sensitive data stored online
 - Supported by hundreds of nonprofits
- Visit [Partner.FreeWill.com/\[URL\]](https://Partner.FreeWill.com/[URL]) to start your free plan today, or report your existing gift at [Partner.FreeWill.com/Record/\[URL\]](https://Partner.FreeWill.com/Record/[URL]).
- FreeWill can also be used with more complicated estates by generating a list of documented wishes that can be brought to an attorney.

How to Introduce Planned Giving

Use sensitive, mission-centered language:

- Focus on “a gift in your will,” not “bequest” or “death.”
- Ask open questions about their connection to [PARTNER].
- Emphasize that planned giving lets supporters make a lasting difference without affecting their finances today.
- Use timely moments life milestones or awareness months to share FreeWill as a free resource.



FAQs

Is FreeWill really free?

Yes! FreeWill's tools are completely free to use, made possible by support from hundreds of nonprofit partners.

Is it legally valid?

Yes. Wills created through FreeWill are valid in all 50 states and D.C., and developed with guidance from expert attorneys.

Is my information safe?

Absolutely. FreeWill encrypts all data, never stores sensitive information like Social Security numbers, and meets strict security standards.

Why did [PARTNER] choose to partner with FreeWill?

This partnership makes it simple and cost-free for supporters to protect their loved ones and create a legacy gift that sustains [MISSION] for years to come.

