



CAMPAIGN OVERVIEW

Summer 2026

Smart Giving Suite

Why should we participate?



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

Send outreach now, see gifts later. Each year, smart giving through the FreeWill platform peaks at year-end. But your outreach shouldn't wait! Partners who sent outreach during 2025 saw, on average, 2x the number of smart gifts as those who did not – and the average gift was significantly larger (\$32K vs. \$20K).

Help donors explore their options. Smart gifts are having a moment in 2026, thanks in part to tax law changes. Yet most donors are unfamiliar with these gift types and don't know which to choose. An educational campaign will help them gift their very best gift!

Prepare your full team. Some donors respond to outreach; others, esp. those under management, may respond better to personal touches. Your entire team should support smart gift cultivation! Use the summer months ahead of year-end to train, coach, and align your team on the importance of smart giving.

SUMMER 2026

Must Have Standalone email

JUNE/ JULY 2026



1. Mission Story or Event. Direct Ask

Share an impact story, or an upcoming event and how giving a smart gift is a powerful way for the donor to support your ongoing work.

The best stories are ones that show how a donation can directly impact your organization's work or how your organization's work makes a difference for someone in your community.

2. Educational. No ask

Educate donors on the benefits of giving a Smart Gift. Highlight recent tax law changes and how smart giving may benefit their finances (and your organization!) even more in 2026.

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TAX SEASON 2026

Nice to Haves

Additional pieces available on the [Marketing Library](#) unless otherwise noted.

JUNE / JULY 2026



Board Email

As the end of the year approaches, **now** is the best time to get your board prepared. Share the impact and new findings on smart gifts with board members to educate them on the benefits of smart giving.

Video

Evergreen educational video clips starring FreeWill CEO Patrick Schmitt and fundraising expert Dr. Russell James will answer questions from donors to gift-officers, and can be shared directly with donors.

Content Center

Social Media, e-newsletter, postscripts

Print Pieces

Buckslip, Postcard

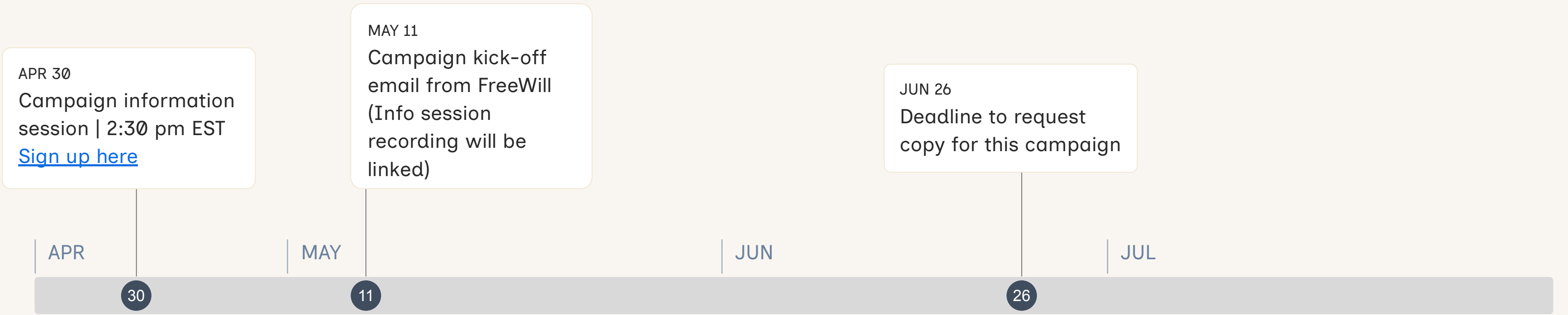
Graphics

Social media graphics, email header

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SUMMER SGS 2026

Campaign Timeline



Request content

Content Team produces copy for partners

Send content to donors (thru mid-July)

