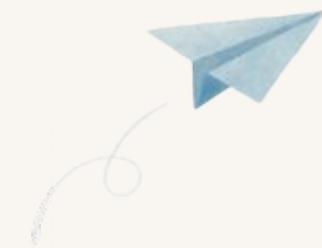


FREEWILL

CAMPAIGN OVERVIEW

Tax Season 2026  
Smart Giving Suite

# Why should we participate?



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

**Tax law has changed...and most donors don't know.**  
Updates to U.S. tax law have altered how charitable giving works, leaving many donors unsure how to give most efficiently. Tax season outreach meets donors at a moment they're thinking about finances

**QCDs are a standout solution for older donors.** QCDs are one of the most powerful giving tools available, as the limit has increased to \$111,000 per person. Clear QCD education positions your organization as a trusted guide.

**Education = Action, and Action = Revenue.** 65% of FreeWill partners who send smart giving outreach see at least one smart gift through our platform. When donors understand their options and have a way to give, they will give!

# Must Have Two-Part Email Series

## 1. Partner 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.



TAX SEASON 2026

# Nice to Haves

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

## Video

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. These will be available on the marketing library **by February 9th**.

## Content Center

Social Media, e-newsletter, postscripts

## Print Pieces

Buckslip, Postcard

## Graphics

Website banner, social media graphics, email header

APRIL 2026



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TAX SEASON 2026

# Campaign Timeline

