



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!

TAX SEASON 2026

Must Have Two-Part Email Series

APRIL 2026



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.

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TAX SEASON 2026

Nice to Haves

Additional pieces available on the Marketing Library unless otherwise noted.

APRIL 2026



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

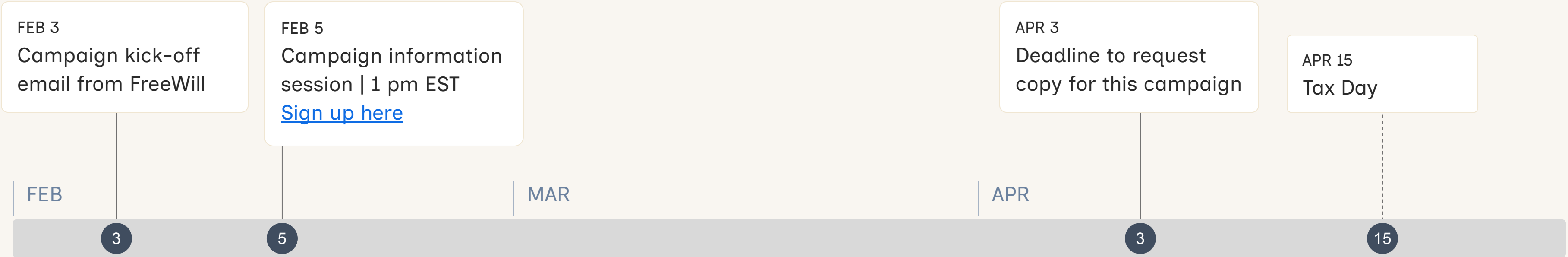
Buckslip, Postcard

Graphics

Website banner, social media graphics, email header

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Campaign Timeline



Request content

Content Team produces copy for partners

Send content to donors (thru end of Apr)

