



CAMPAIGN OVERVIEW

# Winter Bequest 2027 Planned Giving Suite

# Why should we participate?



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

**Consistent outreach drives results.** Partners sending 3 to 4 FreeWill planned giving campaigns a year generate the highest bequest revenue through the platform. With the new year approaching, now is the ideal time to plan your first planned giving effort of 2027.

**Start the year with an ask for long-term support!** Most teams focus heavily on real-time giving at the end of the year to ensure they meet fundraising goals. The new year is a great time to remind donors that there are ways to support your work that cost nothing today.

**Planned Giving provides stability.** Even as nonprofits lose small annual donors, their legacy giving programs are increasingly fueled by small and mid-level donors. Planned giving is a long-term fundraising strategy that allows any donor to make an enduring impact at no cost today.

WINTER BEQUEST 2027

# Must Have Two-Part Email Series

JANUARY – FEBRUARY 2027



## 1. **Mission Story or Event.** Direct Ask, Soft Ask

Share an impact story or an upcoming event and connect the work of your organization to how creating a will, preparing for the future, and including a legacy gift can make a difference.

## 2. **By the Numbers (*Informational*).** No Ask

Share key organizational facts from 2026 tied to the organization to show just how much you've accomplished in the past year. This is a highly educational email with no ask for a bequest.

## 3. **Set Your Intentions (*Thematic*).** Soft Ask

Connect personal goals and resolutions for 2027 with creating a will and protecting the people and causes they care about in the future. This ties to donors creating their own plans for the future to accomplish their own goals.

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# Mission Story

*(Not a donor testimonial!)*

- **Short and succinct:** We only need one or two paragraphs to draft a narrative!
- **Showcase transformation:** Because of X → Y happened. Now Z can continue well into the future
- **Include names (or pseudonyms) and first-person quotes:** People connect more when the story feels personal

Examples:

- **Student Story:** "Coming from a low-income background, the Vanguard Fellowship didn't just pay my tuition; it gave me the network to launch a startup that now employs twenty people," says Julian.
- **Patient testimonial:** "I can finally breathe easy at home," shares Marcus, who escaped a relentless cycle of asthma-related ER visits after the Health Partners home-modifying program addressed the root causes of his illness for good.
- **Environmental Win:** "What used to be a sweltering "heat island" is now a shaded sanctuary. Thanks to City Canopy planting 200 trees, Carlos and his neighbors have seen a permanent drop in cooling costs and a safer, greener park for their children to enjoy for decades."

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# Nice to Haves

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

JANUARY – FEBRUARY 2027



## Content Center

Social Media, e-newsletter, postscripts

## Print Pieces

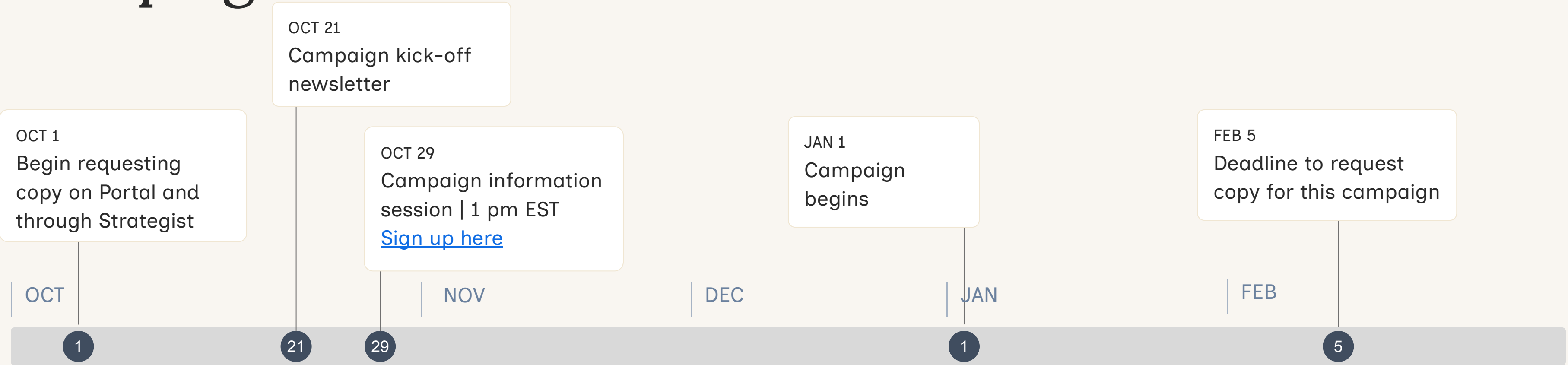
Buckslip, Postcard

## Graphics

Website banner, social media graphics, email header

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# Campaign Timeline



Request content

Content Team produces copy for partners

Send Winter Bequest copy!

