

Dear Partner,

FreeWill is committed to helping nonprofits succeed. Therefore, we are publishing details about regular reviews FreeWill is conducting of nonprofits using our tools to remain in compliance with regulatory requirements in the US. This is meant to help your organization understand what these changes mean and help prevent your organization from losing access to FreeWill's tools as we know they are crucial to the success of your nonprofit.

California's AB488, a law regulating online fundraising platforms, came into force on January 1, 2023 and requires FreeWill to conduct daily checks of the Franchise Tax Board, Attorney General of California, and Internal Revenue Service blocklists. Beginning January 1, 2024, if your nonprofit organization is not in good standing and appears on any of these governmental agency blocklists, your organization will lose access to FreeWill's tools until the matter is resolved. Note that this requirement is applicable to all US charities, not just those headquartered in California. The law requires that if you have been flagged by the State, regardless of your location, we will have to remove your access.

To help prevent this from happening, we suggest you frequently check your status with these agencies to ensure you don't have any paperwork coming due; the processing times may be long and could delay your prompt removal from the blocklists.

Additionally, FreeWill does not own or maintain any of these blocklists; they're owned and maintained by the government agencies listed above.

If your organization loses access to FreeWill's tools due to being out of compliance with the agencies listed, you will not be able to regain access until your organization is in good standing with all three government agencies and removed from all three official blocklists. Keep in mind that once an organization is in good standing, it may take several weeks to be removed from the official blocklists and you cannot proceed until you are removed from all blocklists.

Relatedly, we will continue to allow supporters to donate funds to FreeWill Impact Fund, our affiliate 501(c)(3), for recommended future disbursement to your organization. However, if you're out of compliance with the agencies listed, we will not be able to disburse those funds through grants to you.

Finally, we understand that this may be inconvenient, but we're required by law to implement this new process and it is important to FreeWill that nonprofits comply with their regulatory requirements. Thank you for your understanding and partnership.

Sincerely,

Andrew Nick, General Counsel

Allison Lee, Director of Trust & Estate Content and Strategic Development