

The 2020 FreeWill

Planned Giving Report

An in-depth look at the biggest trends in legacy giving



Visit us at: freewill.com/nonprofits

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Introduction

Planned giving — the process of donors committing to make a gift in their estate plans — is an integral part of nonprofit fundraising. Bequests left in a will and other planned gifts have a major impact on a nonprofit's ability to support the future of their organization.

Yet only the most well-funded nonprofits have historically maintained robust planned giving programs. For smaller organizations, it's generally been regarded as a “nice to have” instead of a “need to have.” This is because the ultimate timing on planned giving revenue is uncertain, and cultivation and stewardship are time-consuming.

Meanwhile, most people assume that estate planning is expensive, or they find it intimidating. As a result, 70% of Americans don't have an up-to-date will.¹ However, this may be rapidly changing. In the face of the Coronavirus pandemic, Americans are rushing to make wills² — and deciding where to allocate their bequest dollars right now. On FreeWill, we saw a 163% increase in wills made in March compared to the previous year.

If there has ever been a time for a nonprofit to invest in planned giving, this is it. Beyond an increase in wills, the U.S. is about to experience the greatest wealth transfer in human history. Over the next 25 years, Baby Boomers will pass an estimated \$30 to \$60 trillion on to the next generation.³ Nonprofits that cultivate their supporters now will reap the benefits in bequests.

Between recent changes to the U.S. tax code and the economic effects of a global pandemic, planned giving has become all the more essential for fundraising nonprofits. According to a recent Gallup poll, the percentage of Americans donating to charity has hit a new low.⁴ 2018 saw the first year-over-year decrease in charitable giving from individuals in more than five years. This was most likely spurred by fewer Americans itemizing deductions on their tax returns, as well as an erratic stock market at the end of the year. While 2019 was a particularly strong year for charitable giving, 2020 will look more like 2018 as many struggle to stay afloat in a troubled economy.

¹ 2020 Estate Planning and Wills Study. <https://www.caring.com/caregivers/estate-planning/wills-survey>

² Americans rush to make online wills in the face of the coronavirus pandemic. <https://www.cnn.com/2020/03/25/coronavirus-pandemic-triggers-rush-by-americans-to-make-online-wills.html>

³ \$68 trillion is about to change hands in the US. <https://www.cnn.com/2018/11/20/great-wealth-transfer-is-passing-from-baby-boomers-to-gen-x-millennials.html>

⁴ Percentage of Americans Donating to Charity at New Low. <https://news.gallup.com/poll/310880/percentage-americans-donating-charity-new-low.aspx>

However, this doesn't mean that Americans don't want to give to causes they care about. In fact, Gallup also reported that 25% of people hope to increase their charitable giving in 2021. If nonprofits can tap into this desire to help without costing donors a cent right now, they will have an incredible opportunity to recoup what could be significant losses in annual giving.

My cofounder, Jenny Xia Spradling, and I launched FreeWill in 2017 in the belief that the tools and principles of grassroots digital fundraising could extend planned giving far beyond its existing horizons. In the past three years, our free online estate planning tools have helped more than 160,000 people write legal wills online or prepare documented wishes to take to a trust and estates attorney. From this, we've generated more than \$1.6 billion in committed planned giving revenue for nonprofit organizations. 58% of our users have never made a will before, suggesting that these bequests — with an average gift size of more than \$60,000 — represent a pool of planned giving revenue that would have otherwise gone untapped.

In our second annual planned giving report, we're proud to present an in-depth analysis of the biggest trends in legacy giving over the past year. Building off our 2019 report,⁵ we've collected even more data to produce the clearest look into planned giving yet: who gives, how much, and from where in the country. We've also added an entirely new section that examines the effects of the Coronavirus pandemic on planned gifts and nonprofit teams.

Our present moment represents a massive fundraising opportunity for planned giving officers and the nonprofits who benefit from their outstanding work. I hope this report is useful to you and your organizations as you develop strategies to maximize fundraising so you can keep working to make the world a better place.

Sincerely,

A handwritten signature in black ink that reads "Patrick Schmitt". The signature is fluid and cursive, with the first name "Patrick" and last name "Schmitt" clearly distinguishable.

Patrick Schmitt
Co-CEO FreeWill

⁵ FreeWill 2019 Planned Giving Report. <https://www.freewill.com/planned-giving-report-2019>

About the Report

This report is an analysis of estate plans and bequests made through FreeWill's platform from June 2019 to June 2020. In that time, 81,649 FreeWill users completed free legal wills (or documented their wishes to be taken to an attorney). Of those wills, 10,358 included charitable bequests, totalling an expected value of \$800,660,901.

Over the course of this report, we reviewed eight different variables and considered each in terms of how they correlated to the four following data points:

1. The total number of wills made
2. The number of bequests made
3. The expected value of those bequests⁶
4. The number of wills made that include a bequest

Where possible and appropriate, we sought to balance our insight against publicly available and verifiable statistics.

Throughout the report, we have also included suggested learning points and use cases in the hopes that they spur inspiration and thought.



[Patient Access Network \(PAN\) Foundation](#) has secured more than \$1 million in bequest commitments through FreeWill in the past year. Their mission is to help under-insured people with life-threatening conditions get access to treatment. Since their supporters are particularly vulnerable to Coronavirus, they wanted to be extremely careful with outreach around planned giving during the pandemic. In April, they offered FreeWill as a resource to their community in a carefully-crafted, COVID-aware email. They focused on encouraging people to consider making a will to protect their loved ones. From there, they followed up with interested supporters with a gentle ask, generating a dozen new bequest commitments within a matter of weeks. Alongside email communications, PAN Foundation also provides supporters clear information on their website on how to easily make gifts in their wills.

⁶ The vast majority of bequests made on FreeWill's estate planning tools are made as percentages of the will writer's estate, rather than as a cash lump sum. We calculate the value of the bequest based on the estimated value of the estate as provided by the will writer.



Planned giving overview

The data we've collected on FreeWill provides an exciting look into the planned giving landscape as a whole. On our platform, donors from across the United States chose to leave gifts in their will to a variety of nonprofits — from animal shelters to universities to museums — and in greatly varying amounts.

By making wills accessible to everyone, we were able to open up planned giving to a much wider audience than nonprofits normally target. While many organizations only have the capacity to ask their top donors for bequests, FreeWill makes it easy for them to bring in thousands of small dollar donors as well.

As expected, the higher the value of an individual's assets, the more likely they were to give. However, the likelihood for individuals with a lower asset value estimate to make a bequest was not insignificant. Of willmakers with less than \$200,000 in assets, 12% still chose to leave a bequest. This suggests that, when presented with an accessible way to make planned gifts, many nonprofit supporters are eager to give.

Donor's estimated asset value	% of wills with bequests
Less than \$200K	12.48%
\$200K-\$500K	11.57%
\$500K-\$1M	13.30%
\$1M-\$2M	15.87%
\$2M-\$5M	17.80%
\$5M-\$10M	21.58%
\$10M+	26.32%

Bequests on our platform ranged from as low as \$100 to more than \$50 million. The mean size of a bequest was \$60,828. Just over 13% of wills with bequests included more than one bequest, averaging out to 1.3 bequests per will. As a result, the mean size of all gifts within a will with a bequest was \$82,232.

Furthermore, 67% of donors on our platform opted in to share their contact information with their nonprofit beneficiaries. This is much higher than the general planned giving landscape. When Giving USA conducted interviews with donors in early 2019, they found that only 4% of donors *always* tell the organization about their planned gifts, and 38.7% of donors *sometimes* inform the organization.⁷ Our own research from 2016 (prior to launching FreeWill) found that the number of donors informing organizations about planned gifts was between 20% to 25% — much lower than the donors on our platform now.

This means that across the industry, nonprofits are unable to thank or steward the majority of their planned giving donors. FreeWill is working to solve this problem by making it easy for donors to share their information and letting them know why it's important to the work of the nonprofit they're supporting.

⁷ New study on planned giving reveals key insights into donor motivations and behaviors. Giving USA. <https://givingusa.org/just-released-special-report-leaving-a-legacy-a-new-look-at-planned-giving-donors/>

Age⁸

The key takeaway

As Americans get older, they become less likely to leave gifts to a charity in their will. Yet, the total value of their bequests increases significantly. Middle-aged adults (45-64) only make up approximately 35% of the American adult population, but they represent more than 41% of all the wills and nearly 50% of the total value of all charitable bequests made on our platform. All adults over 44 give more than 80% of total bequest dollars.



Planned giving officers have long focused their efforts and resources on middle-aged and older donors. The data we've collected validates that strategy. While people over 45 are less likely to include a charitable bequest than their younger counterparts (probably due to the fact that more of them have children, which leads to lower bequesting rates), the total value of their bequests is approximately 400% higher.

However, fundraisers would be remiss to ignore bequest intent from younger adults. People aged 18 to 24 are far more likely to make a bequest than any other age group. While the value of their gifts tends to be significantly lower than other age groups and the realization of their gifts is far into the future, they clearly want to support causes they care about. For nonprofits, they may represent a low-cost opportunity to capture interest in giving that will likely pay great dividends not only in the decades to come, but in the present, as well.

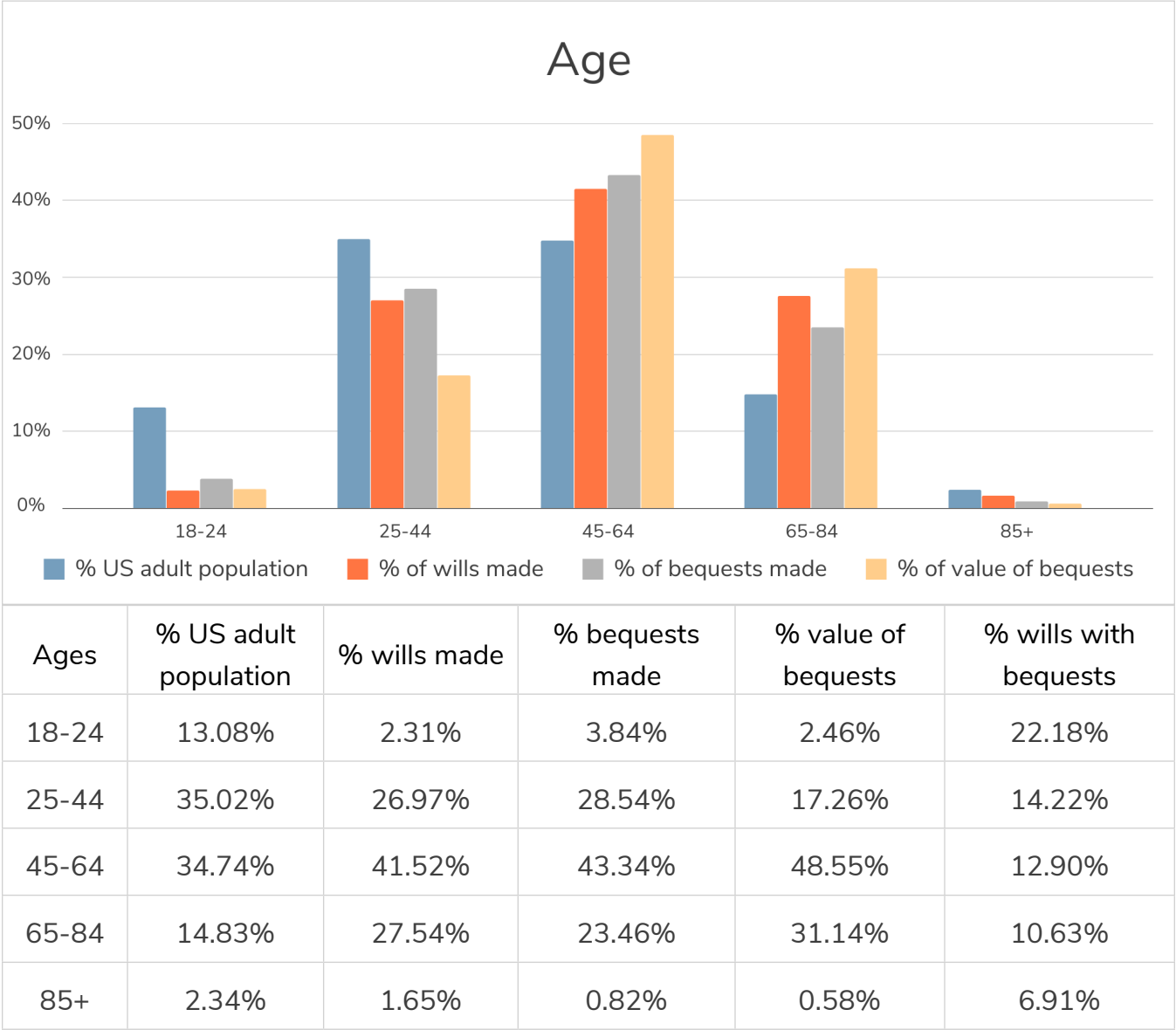
Once a donor includes a nonprofit in their will, they are much more likely to give to that organization again in the future. Research shows that bequest donors increase their average annual giving by more than 50%.⁹ Plus, younger adults will increase in net worth as they age. If nonprofits continue to steward these young planned giving donors, they may see larger bequest commitments from them as they update their estate plans throughout their lives. It also presents a great opportunity for nonprofits to cultivate these donors into a lifetime of annual giving.

⁸ We have only considered wills made by people over the age of 18 in this analysis.

⁹ *The Emerging Potential of Longitudinal Empirical Research in Estate Planning: Examples from Charitable Bequests*. Russell N. James III. https://lawreview.law.ucdavis.edu/issues/53/5/symposium/files/53-5_James.pdf <http://www.encouragegenerosity.com/ACBD.pdf>

The data

The average age of a willmaker on FreeWill is 55. Those aged 18 to 24 make up more than 13% of the US adult population, but only account for 2.31% of wills made on our platform. The overwhelming majority of wills, almost 70%, are made by those aged 45 to 84 — despite them representing only 50% of the adult population. The divergence between the share of population and the share of wills being written is particularly pronounced for people aged 65 to 84. They account for just 14.83% of the adult population but almost twice the relative share of wills at 27.54%.





Gender

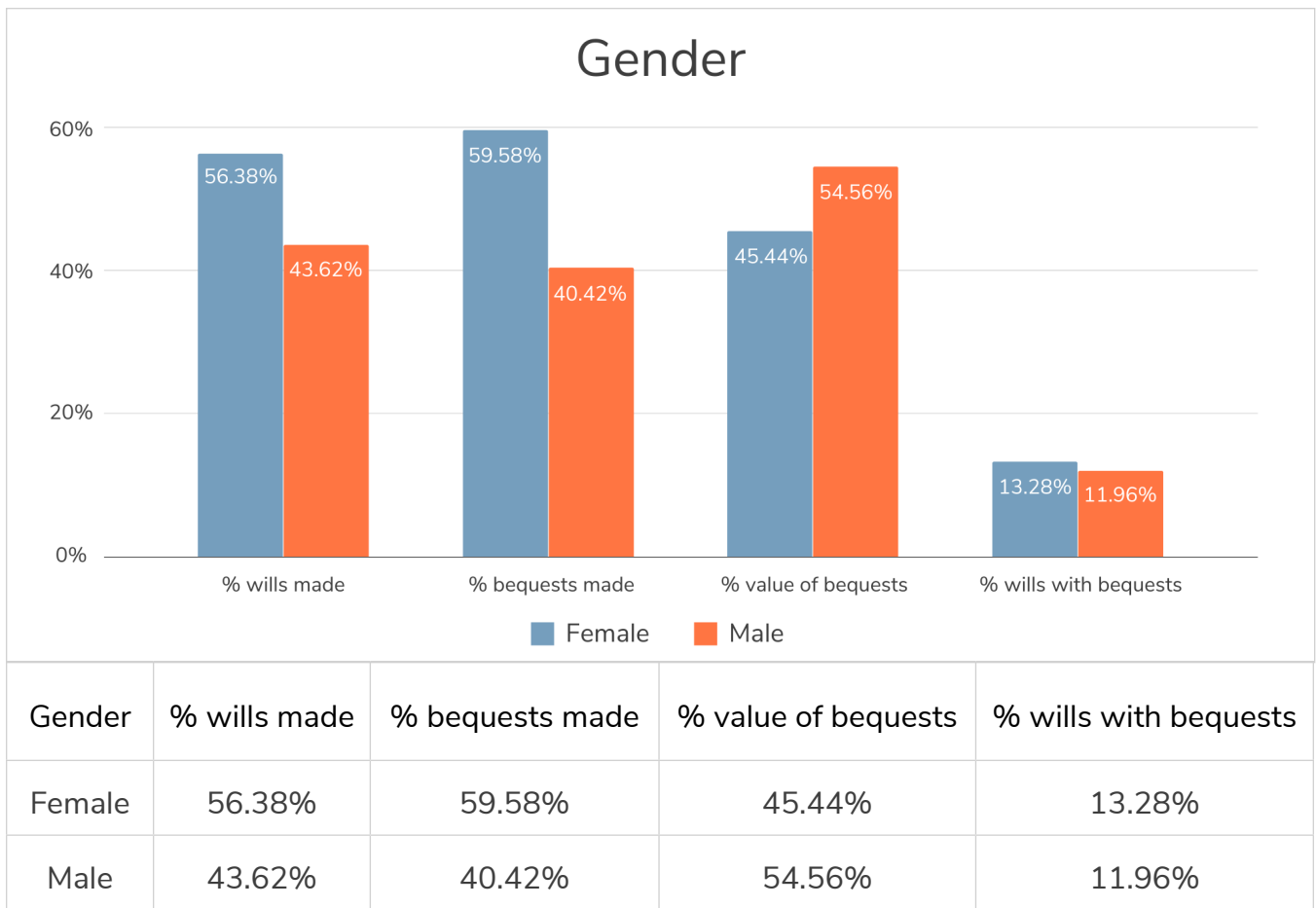
The key takeaway

As a whole, men are less likely to write wills and leave bequests to charity. But what they lack in quantity, they make up for in sheer dollar value. While women gave almost 60% of the bequests made on our platform, they only represent 45% of the total value of charitable contributions. The number of bequests made by women during this period of analysis jumped by six percentage points over our 2019 analysis of the first 50,000 wills made on our platform. And the total value of their bequests jumped by five percentage points. In our 2019 report, we had found that men were more likely to make bequests. However, this changed in the past year. In this analysis, we found that male willmakers are now slightly less likely to leave bequests than women — though the difference is less than two percentage points.

The first stage of the Great Wealth Transfer will most likely be from men (who have statistically shorter lifespans than women) as they leave their assets to their spouses. Following this logic, planned giving officers may think that they should focus their resources primarily on female donors. However, the fewer bequests from men are still likely to be worth considerably more than the same number of bequests from women. Knowing this, nonprofits may want to dedicate time to cultivating gifts from both genders equally for the next few years. As time goes on and more of the Baby Boomer generation passes away, nonprofits should focus more of their efforts on women, who will begin inheriting their partner's assets and giving more and larger gifts.

The data

Women make up half the US adult population, but they created more than 56% of the wills made on our platform.



Marital and parental status

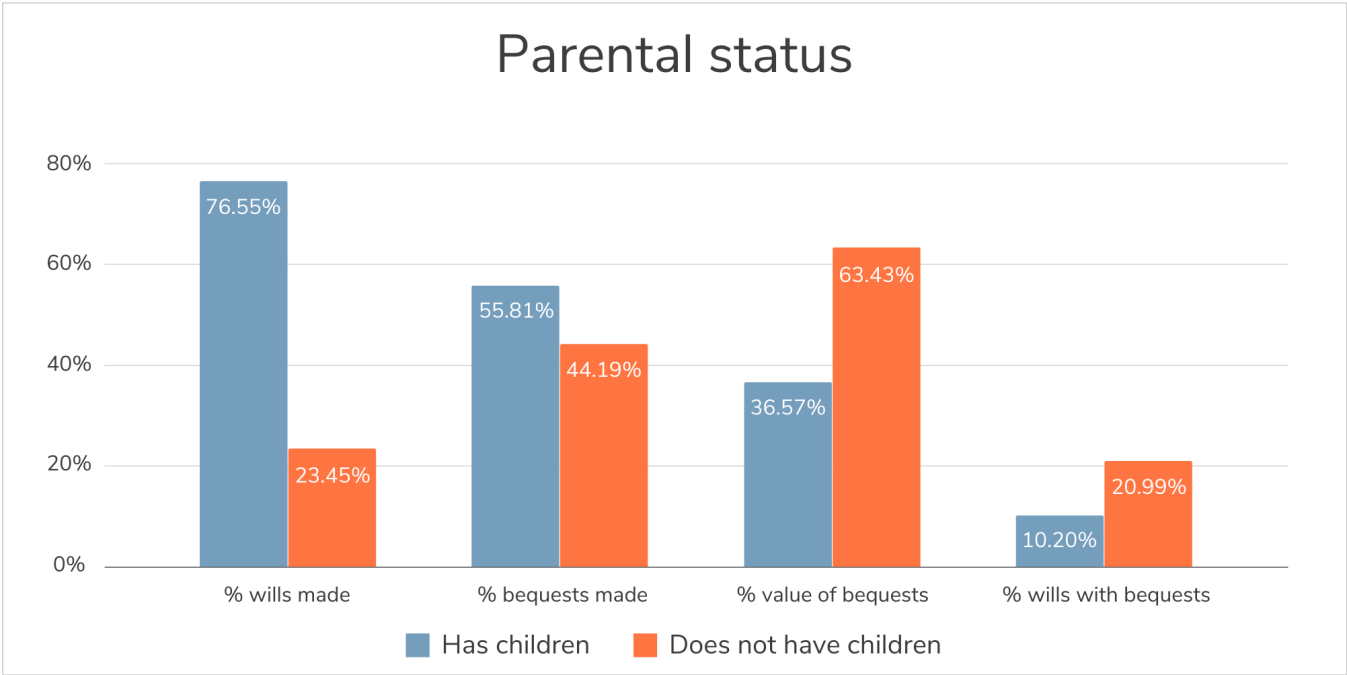
The key takeaway

Individuals with fewer family attachments are much more likely to include a charitable bequest in their wills. More than 75% of our willmakers are parents, but only 10% of them chose to leave a bequest.

For those without children, however, the likelihood of leaving a bequest more than doubled. Over 20% of adults without children chose to give to charity. Their bequests were also significantly larger, representing around 63% of the total value of charitable gifts. This data will not be surprising to many planned giving officers, who have seen this in their work and made it a big part of their stewardship and cultivation strategies.

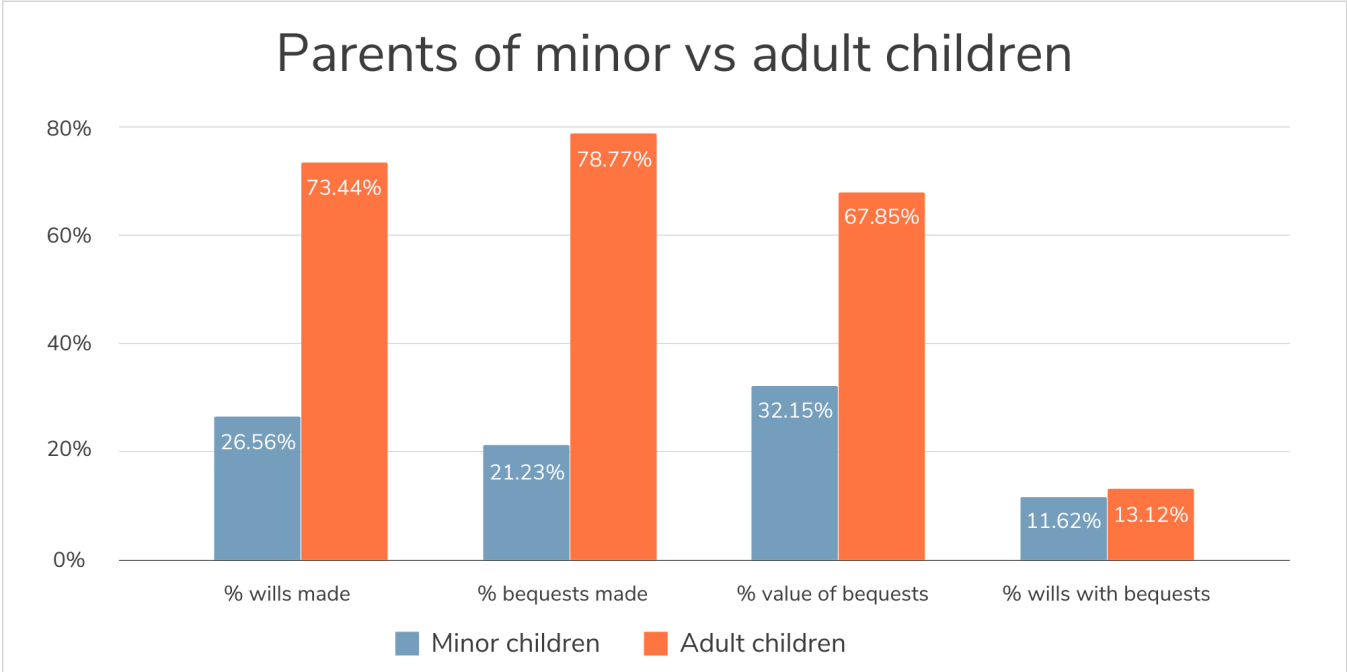


Parental status data



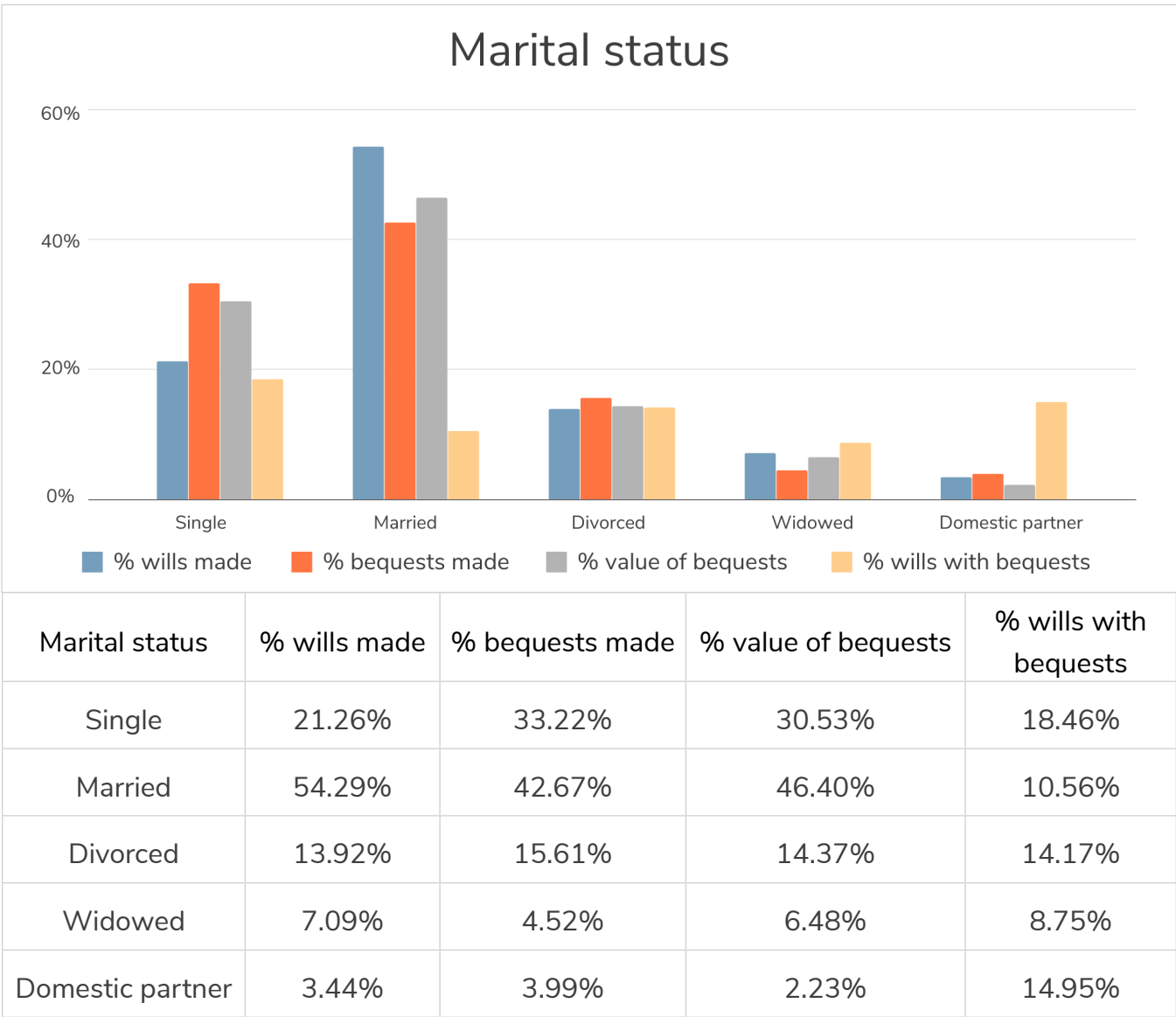
Parents of minor vs adult children data

There was a difference in the giving habits of parents who had only adult children and those who had minor children. Knowing the age of our average willmaker is 55, it's not surprising that willmakers with adult children accounted for more than 73% of all the wills made by parents. These willmakers were also slightly more likely to make bequests. Plus, they gave a significantly larger number of bequests per will and at a much greater total value.



Marital status data

People who are unmarried are the most likely to leave a bequest in their will, and for that bequest to be of a significant size. Married willmakers created nearly 55% of the wills on our platform, but only 10% of them chose to give to charity. This suggests that they are much more likely to want to leave a larger portion of their estate to their spouse or partner. Divorced individuals and those in domestic partnerships gave bequests at around the same rate. Surprisingly, however, widowed individuals were much less likely to give than those who were single or divorced.



The most generous states

The key takeaway

The most generous location is not a state, but the capital, Washington, DC. Nearly 30% of willmakers in DC chose to make a bequest. Of wills created on FreeWill, there is generally a high correlation between the likelihood of making a bequest and locations that have strong economies and higher concentrations of wealth. California and New York follow DC for a high percentage of wills with bequests, as well as the average number of bequests per will. And all five of the locations with the highest number of bequests — DC, California, New York, Hawaii, and Alaska — are in the top fifteen states in terms of median household income.



DC's average number of bequests per will is double California's average — the closest state behind it. So while this geographic correlation suggests that the relative wealth of an area is one of the most important factors when considering the likelihood of planned giving, it is not the only factor. Another major factor is a bit harder to measure: the passion and idealism of an area's residents.

Washington, DC is the home of the United States federal government, as well as the gravitational center of the nonprofit ecosystem. A significant proportion of national nonprofits are headquartered in DC. People who live and work in the area are likely to be idealistic, committed to public service, and community-minded. It is not surprising, therefore, that DC residents leave bequests in their wills at such a high rate.

The data

States whose residents were most likely to leave a bequest

Of people who made a will with us, those who chose to include bequests at higher rates came from very different areas. In our 2019 report, we found that Vermont came in second to DC in terms of the average number of bequests per will. In the past year, however, it was bumped out of our top five by Alaska — showing an even greater difference (geographically, politically, and culturally) in the areas that are likely to make planned gifts.

Rank	State	% wills with bequests	Avg # of bequests per will	Median household income ¹⁰
1	DC	27.86%	0.46	\$85,203
2	California	18.54%	0.25	\$75,277
3	New York	16.64%	0.21	\$67,844
4	Hawaii	15.81%	0.20	\$80,212
5	Alaska	15.53%	0.21	\$74,346

As in our last report, we decided to compare planned giving in DC against another major East Coast city: New York City. DC's generosity was even greater in our current findings than it was previously.

New York City:

- 2019 Planned Giving Report: 38 bequests per 100 wills
- 2020 Planned Giving Report: 33 bequests per 100 wills

District of Columbia:

- 2019 Planned Giving Report: 42 bequests per 100 wills
- 2020 Planned Giving Report: 46 bequests per 100 wills

While DC's average number of planned gifts went up, New York's gifts dropped. The difference between the two major cities show an even greater likelihood that DC's residents are much more primed to give.

¹⁰ American Community Survey, Household Income: 2018. U.S. Census Bureau. <https://www.census.gov/library/publications/2019/acs/acsbr18-01.html>

States whose residents were most likely to make a will

We calculated how many wills made on FreeWill came from each state and then considered that against the share of the state-wide population,¹¹ allowing us to see which states over-indexed.

Given the link between older age and likelihood of making a will, it's not surprising that Florida tops our list of states for wills made above the relative share of population. Florida, a haven for retirees, ranks fifth in the U.S. for the highest median age. However, several of the top states for will writers ranked in the bottom fifteen for median age. These were the same states that over-indexed in our 2019 findings: Colorado, Georgia, and Washington. In last year's report, New York also over-indexed. However, this year, the state fell far behind, under-indexing at 0.42%, and being replaced in our top five by South Carolina.

Rank	State	% of wills made above population share	Median age ¹²	Age rank (highest to lowest)
1	Florida	1.76%	42	5
2	Georgia	1.24%	36.8	40
3	Colorado	0.87%	36.8	40
4	Washington	0.85%	37.7	35
5	South Carolina	0.72%	39.4	15

¹¹ 2018 National and State Population Estimates, U.S. Census Bureau. <https://www.census.gov/newsroom/press-kits/2018/pop-estimates-national-state.html>

¹² Here's how old the typical person is in each US state. <https://www.businessinsider.com/state-median-age-map-2018-11>

Pet ownership

The key takeaway

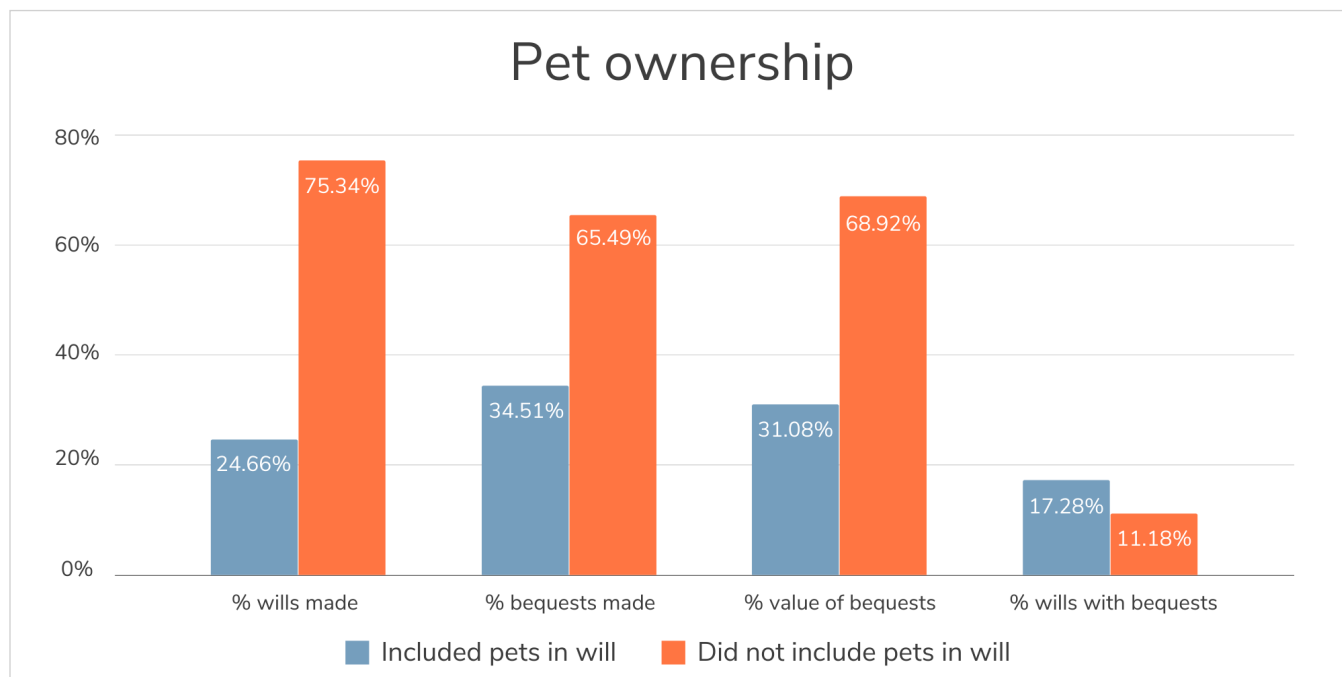
Pet owners are 55% more likely to give to charity in their wills than people who either don't have pets or choose not to provide for their pets in their will. Nearly 18% of people who included their pets in their wills made bequests — well above the average of 12.7% for willmakers on our platform. This strong correlation between pet ownership and inclination toward planned giving represents a significant opportunity for development professionals, particularly those who work for animal and wildlife-focused nonprofits. By targeting animal owners, fundraisers may find that they are able to increase their number of gift commitments and generate more interest in planned giving.

It should be noted, however, that the value of bequests from pet owners is lower. Only 11% of people without pets left bequests in their will, but their gifts were 16% larger on average. Even though gifts from pet owners may be smaller, the ability to raise a larger quantity of them can make up for value.



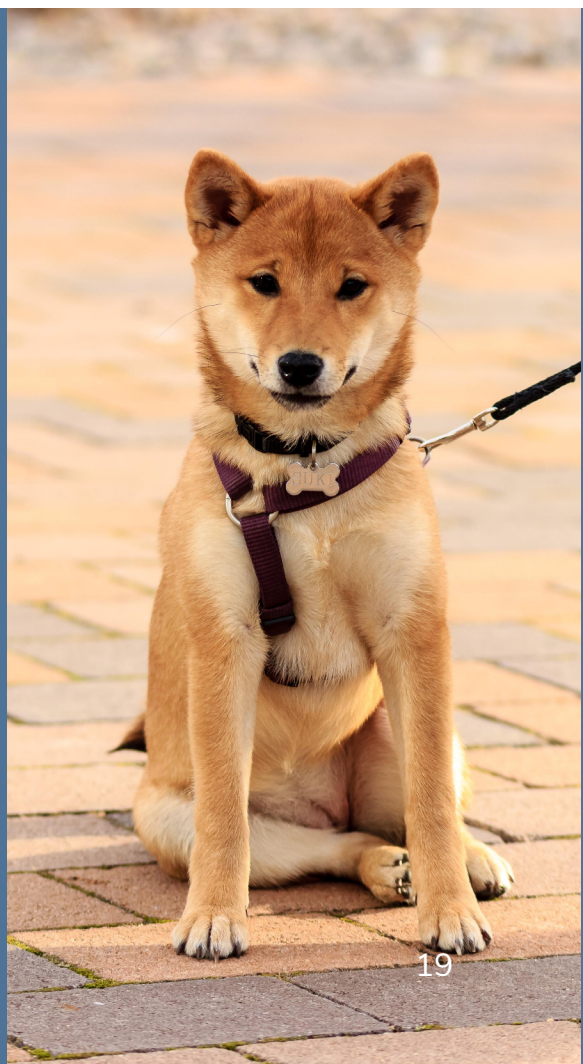
The data

More than 75% of wills on our platform were made by people who didn't own pets, or chose not to include provisions for their pets in their wills.



Soi Dog received nearly \$600,000 in bequest pledges through FreeWill in just one month.

Based in Thailand with a large U.S. following, Soi Dog wanted to grow their legacy society and support their mission to improve the welfare of dogs and cats in Asia. They launched their partnership with FreeWill in May 2020, testing emails that focused on their dedication to helping animals and experimenting with language that shared FreeWill as a resource. They found that a soft ask, encouraging their supporters to protect the people and pets they love with a will, was far more effective than a direct ask to create a legacy. With just two emails, they gained 15 bequests from new planned giving donors and generated hundreds of thousands to support the future of their organization.





Digital assets

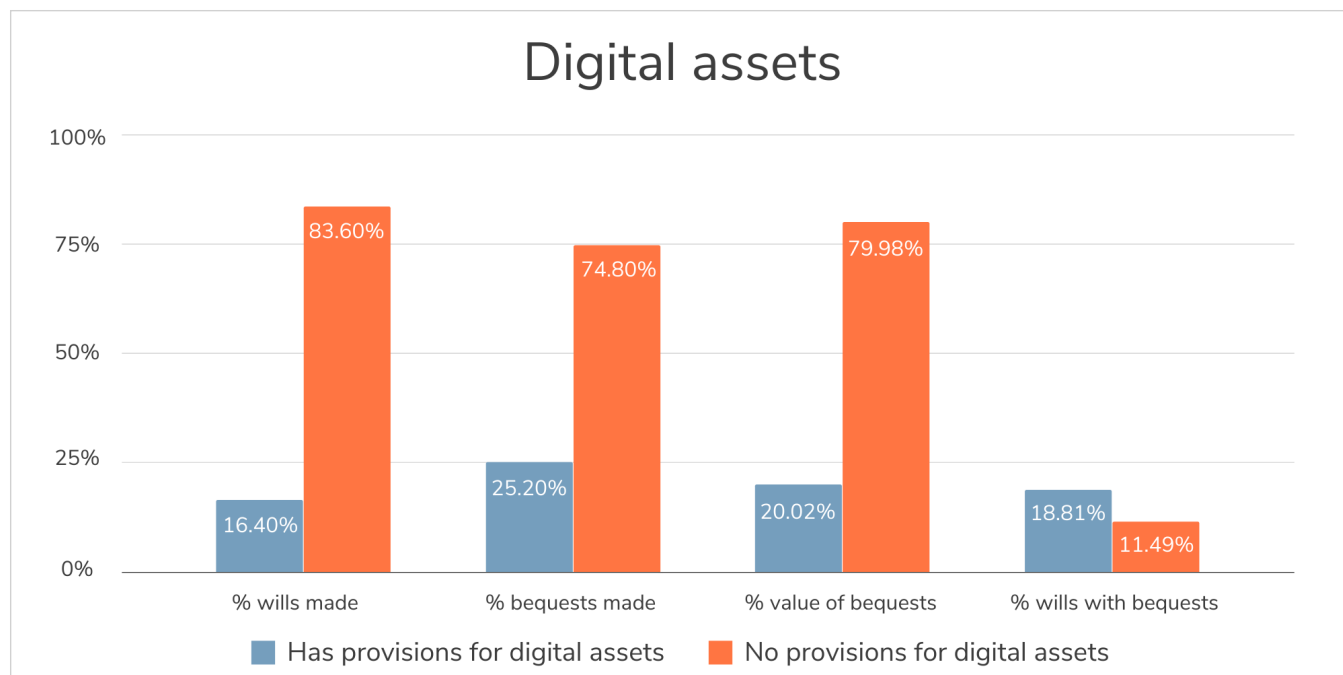
The key takeaway

More than 80% of people choose not to make plans for their digital assets in their wills, but those who do are much more likely to include charitable bequests. Because FreeWill is an online software, all of our willmakers are internet users, presumed to have digital assets. Digital assets can include social media accounts, digital photos, email accounts, domain names, and more. However, only 16% of will writers on our platform made any sort of plan for their digital assets — two percentage points lower than our findings in our 2019 report.

As in our last report, we found a surprising correlation between digital asset planning and charitable giving. More than 18% of willmakers who included plans for their digital assets also left a bequest to a charitable organization. In comparison, only 11.49% of those without digital asset plans made gifts.

Over the next year as the United States grapples with the effects of the Coronavirus pandemic, it won't be surprising if most fundraising goes digital. This means that nonprofit organizations will be growing their online donors lists, resulting in a significant opportunity to help their donors while also raising more planned gift commitments. Nonprofits can offer these donors free online estate planning services with a reminder that they can use it not only for their "real world" property, but also for their digital assets. Knowing that willmakers with plans for their digital assets are more likely to give, this could result in a significant number of bequests.

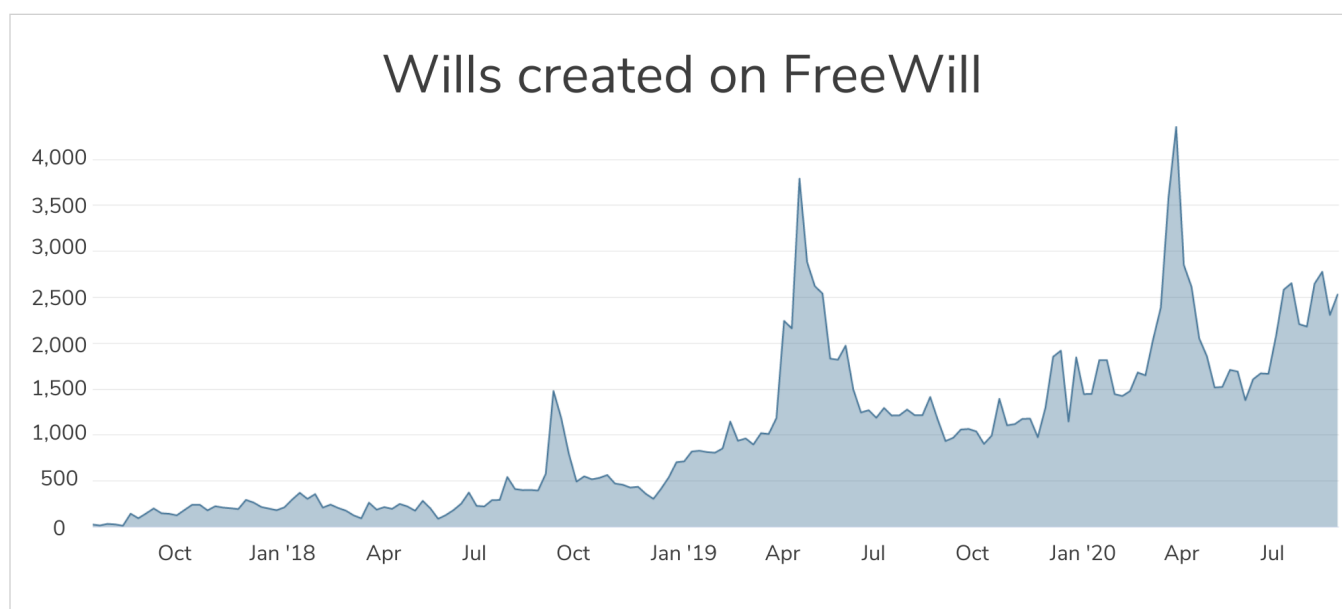
The data



The Coronavirus pandemic

The effect on wills and bequests

The Coronavirus pandemic is driving an incredible increase both in the number of people making wills as well as the number of bequests. Since the start of the pandemic in the U.S. in March, the rise in will-making has been repeatedly reported in the media, and brought a rush of new users to our site. While we might expect a broader audience to decrease the number of people interested in making planned gifts, we found that the opposite was true. In March alone, we saw a 400% increase in the number of wills with bequests compared to the same month in 2019, and close to a 200% increase compared to the month before (February 2020).



As Coronavirus infections appeared to be subsiding in May and June, wills and bequests began to drop back to prior levels. Then, as infections reemerged aggressively throughout the U.S., the numbers went back up. In August, wills with bequests increased by nearly 300% over the same time last year.

Towards the beginning of the pandemic, many organizations were nervous about their planned giving communications, fearing that they would appear insensitive. However, nonprofits that tapped into the moment and provided free estate planning resources to their supporters found significant success with planned giving. This was crucial for them in a period where record numbers of workers were laid off and unable to support the causes they cared about with cash donations.

We surveyed hundreds of nonprofit fundraising professionals in both March and April of 2020, asking them if they had seen an increase or decrease in gift types. Of these professionals, 33% reported that annual giving decreased in March and 39% reported a decrease in April. For planned giving, on the other hand, only 10% and 8% saw a decrease for March and April, respectively. And a significant number — nearly 18% in March and 22% in April — saw an increase in planned gifts.

As the pandemic continues, nonprofits have the opportunity to reach their supporters about the importance of estate planning. With thoughtful, sensitive messaging, organizations can connect with their supporters on a deeper level, meet their needs, and continue to effectively generate much needed funds for their mission.

The effect on nonprofit work

The Coronavirus pandemic radically affected how planned giving officers work. Donor events and in-person visits are a crucial part of most fundraising strategies for planned and major giving teams. Beginning in mid-March, we began holding a weekly (now bi-monthly) webinar series, and surveying hundreds of nonprofit professionals before each one. By March 20, nearly 95% of nonprofit professionals reported that they had begun working from home. All donor visits were paused for 90% of them, and 81% reported that their organization had canceled in-person events for the next few months.

At FreeWill, we saw a surge in interest in how to adjust fundraising strategies, hold virtual events, and meaningfully connect with supporters online. By April 10, nonprofits began testing new strategies to engage their donors. Nearly 28% reported that they had switched an in-person event to a virtual event and more than 71% had increased phone calls. By being flexible and embracing new models of work, many nonprofits were able to slow losses in annual and major gifts. Some were even able to reverse the tide, reporting increases in annual, major, and planned giving in April.

The data

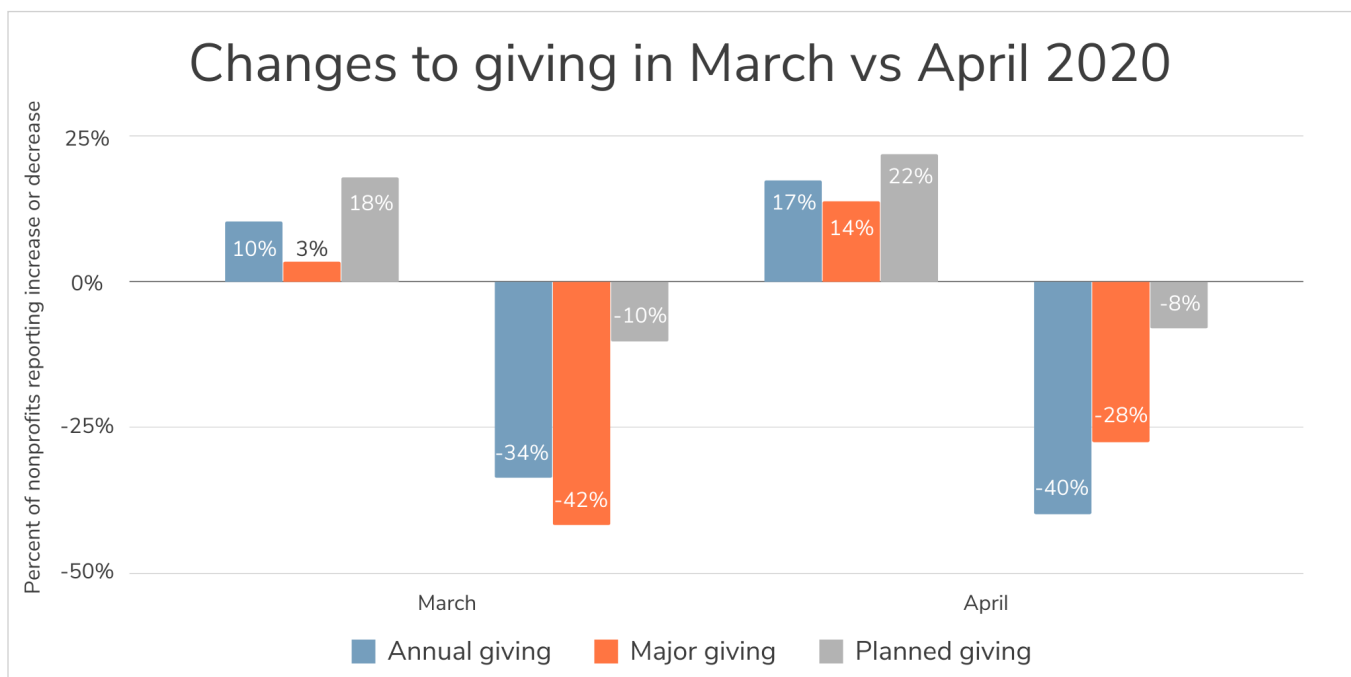
Increases to wills and bequests

We saw a significant increase in the number of wills and bequests made on our platform as the pandemic surged. We've highlighted in green where we saw over a 100% increase and highlighted in red where we saw a decrease.

2020 in comparison to the same months in 2019	% change in wills made	% change in bequests made	% change in value of bequests	% change in wills with bequests
Feb 2020	68.19%	118.80%	102.31%	109.90%
Mar 2020	163.51%	348.25%	84.30%	446.25%
Apr 2020	13.30%	109.97%	-21.41%	162.41%
May 2020	-31.69%	20.40%	-52.16%	44.48%
Jun 2020	6.67%	56.15%	-17.74%	81.82%
Jul 2020	92.84%	195.22%	84.93%	246.93%
Aug 2020	101.79%	276.59%	79.91%	295.21%

Changes to annual, major, and planned giving

The majority of nonprofits reported decreases in annual and major giving during March and April, though some were able to see increases. While a few nonprofits reported decreases in planned giving, many more reported an increase in those gifts.



What we learned

In our second annual Planned Giving Report, we found further evidence that older donors, particularly those without children or close family connections, give the majority of charitable bequest dollars. This supports most planned giving officers' long-held strategies. However, these donor types shouldn't be a gift officer's sole focus. If they are, fundraisers may miss out on opportunities to reach young, passionate donors, animal lovers, those in unexpected locations, and more.

Through the trends surfaced in our research, it's clear that the most significant driver of planned giving is not just a person's net worth, but also their level of passion for issues and causes they care about.

In an unprecedented year where many donors will be impacted by economic losses, the best planned giving strategy is to reach a broader audience and implement thoughtful, sophisticated outreach. While a wider focus may mean a lower average monetary value per gift, the sheer increase of new bequests can make up for this. Plus, bringing in new planned giving donors will mean more individuals to steward into a lifetime of annual giving and engagement.

With digital platforms like FreeWill, organizations have the potential to solicit planned gifts at scale and support their mission for years to come. Reaching new planned giving communities does not have to replace traditional one-to-one relationship building by planned giving officers. Instead, it should augment it and provide supporters with the opportunity to make a meaningful impact on the causes they care about — even when they might not be able to make cash gifts. This will help significantly increase revenue outcomes for fundraisers for many years into their organization's future.

Acknowledgments

We couldn't have created this report (or done the work that led up to it) without the participation of our incredible nonprofit partners in the education, healthcare, environmental sustainability, disaster response, religious, and advocacy sectors. It's a privilege to work with them as they make the world a better place.

How to find out more about FreeWill and this report

If you're interested in learning more about how FreeWill can accelerate planned giving at your organization, please go to www.freewill.com/nonprofits.