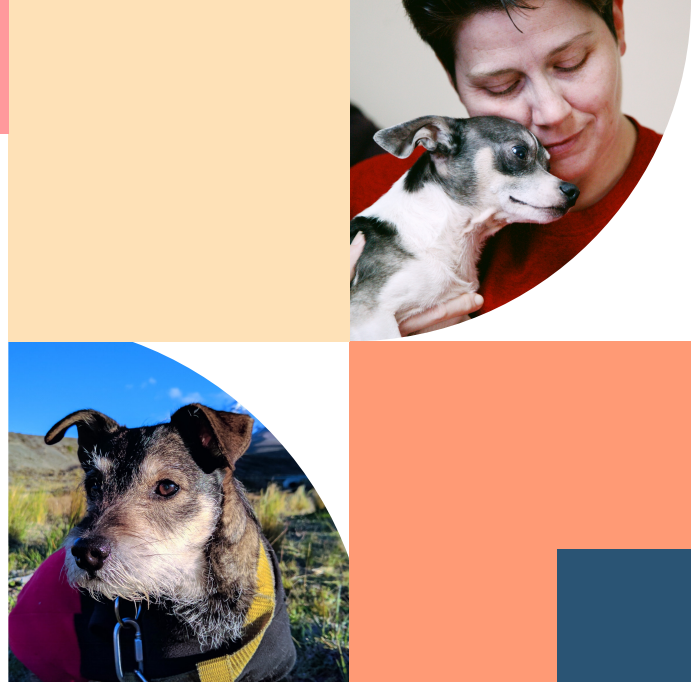


# Wills and trusts: How Muttville Senior Dog Rescue secures legacy gifts in California



## RESULTS

**\$3.6M** Total committed

**68** Legacy donors



*My biggest challenge is finding enough time to focus on planned giving to the degree that I would love to. And that's where FreeWill comes in and provides a tremendous resource for us.*

**Erick Smith**  
Director, Strategy & Engagement

## THE CHALLENGE

Muttville, a cage-free dog rescue based in San Francisco that finds homes for senior dogs, has a lean fundraising team, with no one person charged with building out and growing a planned giving program.

In 2019, their Director of Strategy and Engagement, Erick Smith, stepped up to learn more about planned giving and help their organization engage new legacy donors.

However, he was already in charge of managing and coordinating fundraising activities, appeals, and capital campaigns, as well as handling risk management for the rescue organization. This left little time for him to focus on planned giving to the degree he wanted.

## THE SOLUTION

After hearing about FreeWill during a planned giving seminar series, Erick and Muttville's CEO reached out to learn more about the tools available.

They understood the value of fundraising legacy gifts and the importance of securing future revenue, and wanted to find a solution that could support their organization's work.

## SUCCESS WITH RLTS

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\$2.9M

Raised in committed gifts from revocable living trusts

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81%

Of total committed dollars will be distributed from RLTS

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57%

Of new legacy donors made revocable living trusts

They decided to launch with FreeWill's Bequest Tool, giving their supporters an easy way to make wills or revocable living trusts and leave charitable bequests to the organization.

With a wealth of FreeWill resources, best practices, and recommendations to help guide them, as well as a dedicated strategist, they've been able to incorporate planned giving into almost all of their fundraising appeals.

They believe this keeps the topic familiar in their supporters' minds and helps them secure new commitments.

Their legacy donors represent a wide range of ages, and nearly 60% of them choose to make a California revocable living trust, which can help protect assets from a lengthy and costly probate process in the Golden State.

This not only allows the donor's heirs to access their inheritance more quickly, but ensures that more of the estate goes toward their intended charitable causes, rather than administration fees.

Since then, they've raised over \$3.6 million in charitable gift commitments, 81% of which comes from donors using FreeWill to create revocable living trusts.



*Having the RLT tool is extremely helpful. Any chance that we can have to engage a donor, who wants to make such a personal gift and include our organization in it, is incredible. And we want to be able to give them as many options as possible. So having that available is invaluable.*

**Erick Smith**  
Director, Strategy & Engagement

