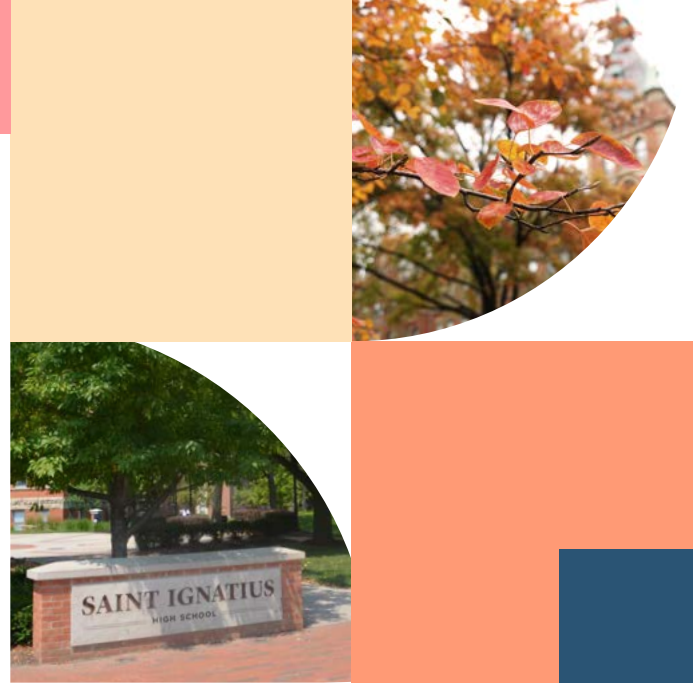


How Saint Ignatius High School simplified stocks & raised \$555K



RESULTS

\$555K	Raised via stocks
1/2	Time spent fundraising
9	Online stock gifts



We have received stock gifts for many years, but wanted to present donors with a tool to make the process easier while encouraging more people to give stock.

Jeff McCormick
Director of Development & Planned Giving

THE CHALLENGE

Saint Ignatius High School in Cleveland, Ohio, has received stock gifts for years, generally stemming from one-on-one conversations with alumni. However, the process has presented some challenges for them, and been even more frustrating for their donors.

To find out how to make a stock gift, their donors had to call or email the school — and the development team spent a lot of time fielding inquiries and educating them.

Handling stock gifts requires teams to understand the transfer process, have the right tax information on hand, and be able to explain the benefits of stock giving. The school's small team was struggling to keep up with requests, losing crucial fundraising opportunities and forcing donors to navigate stock giving on their own.

THE SOLUTION

The school's development team needed a simple way to educate donors and walk them through the stock giving process. That's why they chose to implement the FreeWill Stock Gifts Tool.

STATS ON STOCKS

400%

5-year growth for orgs with \$100-500K in revenue when accepting stock gifts

97-99%

Of wealth in the U.S.A. is held in non-cash assets

Up to 70%

In tax savings for donors who give stock

With this tool, the team has been able to guide the conversation around stock giving with their donors, advising instead of asking. During donor conversations, they share their custom FreeWill stock site as a direct call-to-action, showing how easy it is to start a stock gift online or get their organization's transfer information.

With gifts coming through automatically, the school's development team spends less time following up with donors, and more time on building valuable relationships.

Their donors have enthusiastically embraced the new tool, expressing excitement over how easy it is for them to use. Because the team can now focus more on education, they've been able to raise gifts from new donors and encourage existing donors to make even larger contributions.

MOVING FORWARD

In the past year, Saint Ignatius has raised more than \$555,000 using FreeWill's Stock Tool — including an incredible \$500,000 standalone gift from a dedicated alum.

Now that their team has more time back, they're planning on investing extra energy into raising stock gifts. With the help of the FreeWill Partner Success team, they'll send out dedicated communications around tax efficient ways to give, raising larger, more impactful gifts for their organization.



FreeWill's stock tool is a seamless way to tell the donor how to make their gift. Anyone can do it quickly and even estimate the value of the gift. We have seen new stock gifts from both existing and new stock donors and have received great feedback on the tool all around."

Jeff McCormick
Director of Development &
Planned Giving

