# FREEWILL

# Planned giving website customization guide

**About FreeWill-provided assets**

FreeWill is happy to provide stock photos for any of the indicated assets. You will always have a chance to review and approve stock photo selection prior to those photos going live on your site.

# Site basics

Site basics will set up the essentials of your new planned giving website. From branding and organization information to analytics tracking, site basics covers crucial elements for a solid foundation for your site.

Here are some things you'll need to complete the **site basics** form:

## Content checklist

- [ ] **Website URL**
  Choose a subdomain of one of our domains, a subdomain of your own domain, or a custom domain (pending availability).

- [ ] **Social media links**  *(optional)*

- [ ] **Contact details**
  Information displayed next to the contact form on your website and includes name, title, phone number, and email address.

- [ ] **Mission language**
  Briefly describe your mission and the impact of planned gifts.

- [ ] **Analytics tag**

## Upload checklist

- [ ] **Header logo**
  Requirements
  Minimum size: 260px wide or 112px tall

- [ ] **Footer logo**  *(optional)*
  Requirements
  Minimum size: 260px wide or 112px tall
  *Needed only if different from header logo*

- [ ] **Favicon**
  Requirements
  1:1 ratio
  Minimum size: 260px by 260px

# Homepage

The homepage is likely the first thing donors will see when they visit your planned giving website. Customizations to the homepage allow you to introduce your supporters to the option of non-cash gifts.

Here are some things you'll need to complete the **homepage** form:

## Content checklist

☐ **Carousel slides**

Choose from suggested FreeWill content or create your own. Each slide should have a header, description, and call-to-action.

How many
Up to 5

☐ **Custom FAQs** *(optional)*

Add FAQs specific to your organization.

How many
Up to 5

☐ **Donor testimonial or story** *(optional)*

Provide a short quote for a testimonial or a multi-paragraph story about a donor's decision to leave a gift.

## Upload checklist

☐ **Carousel background images**

How many
Up to 5

Requirements
Horizontal orientation
Minimum size: 1400px wide

FreeWill can provide this asset if none is given

☐ **Future gifts header images**

How many
2

Requirements
Horizontal orientation
Minimum size: 608px by 225px

FreeWill can provide this asset if none is given

☐ **Donor testimonial or story image**

Donor story requirements
1:1 ratio
Minimum size: 225px by 225px

Testimonial requirements
Horizontal orientation
Minimum size: 547px by 342px

*Needed only if content is provided*

☐ **Content block image**

Requirements
Horizontal orientation
Minimum size: 547px by 342px

FreeWill can provide this asset if none is given

# Gifts for the future

Gifts for the future encompasses the **will and trust page** and the **beneficiary designations page**, and introduces donors to popular estate planning concepts and outlines organization-specific acceptance information.

Here are some things you'll need to complete the **gifts for the future** form:

## Content checklist

☐ **Custom FAQs**  *(optional)*
Add FAQs specific to your organization.

How many
Up to 5 per page

☐ **Donor testimonial or story**  *(optional)*
Provide a short quote for a testimonial or a multi-paragraph story about a donor's decision to leave a gift.

How many
Up to 1 per page

## Upload checklist

☐ **Downloadable resources**  *(optional)*

How many
Up to 5

*Applicable for the will and trust page only.*

☐ **Hero images**

How many
1 – Will and trust page
1 – Beneficiary designations page

Requirements
Minimum size: 728x by 485px

FreeWill can provide this asset if none is given

☐ **Content block images**

How many
3 – Will and trust page
3 – Beneficiary designations page

Requirements
Horizontal orientation
Minimum size: 547px by 342px

FreeWill can provide this asset if none is given

☐ **Donor testimonial or story image(s)**

Donor story requirements
1:1 ratio
Minimum size: 225px by 225px

Testimonial requirements
Horizontal orientation
Minimum size: 547px by 342px

*Needed only if content is provided.*

# Gifts that pay you back

Educate your donors about life income gift options and more by defining the supported gift types for gifts that pay you back, including qualifying language for each.

Here are some things you'll need to complete the **gifts that pay you back** form:

## Content checklist

- [ ] **Gift types**
  Choose what gift types you wish to display based on what your organization accepts.
  - [ ] Charitable gift annuities
  - [ ] Charitable remainder trusts
  - [ ] Pooled income funds
  - [ ] Charitable lead trusts

- [ ] **Qualifying language**
  Add any organization-specific information for your selected gift types.

- [ ] **Donor testimonial or story** *(optional)*
  Provide a short quote for a testimonial or a multi-paragraph story about a donor's decision to leave a gift.

## Upload checklist

- [ ] **Hero image**

  Requirements
  Minimum size: 728x by 485px

  FreeWill can provide this asset if none is given

- [ ] **Donor testimonial or story image**

  Donor story requirements
  1:1 ratio
  Minimum size: 225px by 225px

  Testimonial requirements
  Horizontal orientation
  Minimum size: 547px by 342px

  *Needed only if content is provided.*

# Tax-smart gifts

Define supported gift types, add qualifying language, and provide actionable next steps to clarify how donors can support your nonprofit through tax-smart gifts.

Here are some things you'll need to complete the **tax-smart gifts** form:

## Content checklist

- ☐ **Gift types**
  Choose what gift types you wish to display based on what your organization accepts.
  - ☐ Stocks, securities, and mutual funds
    *Option to provide brokerage info and account number for display on your site.*
  - ☐ Cryptocurrency
  - ☐ Qualified charitable distributions
  - ☐ Donor-advised fund grants
  - ☐ Real-estate
  - ☐ Retained life estate

- ☐ **Qualifying language**
  Add any organization-specific information for your selected gift types.

- ☐ **Custom callout block**
  Link to additional information or tools to accept your selected gift types.
  *If you use FreeWill to accept any of these gift types, your tool(s) will be linked automatically.*

- ☐ **Donor testimonial or story** *(optional)*
  Provide a short quote for a testimonial or a multi-paragraph story about a donor's decision to leave a gift.

## Upload checklist

- ☐ **Hero image**
  Requirements
  Minimum size: 728x by 485px
  FreeWill can provide this asset if none is given

- ☐ **Donor testimonial or story image**
  Donor story requirements
  1:1 ratio
  Minimum size: 225px by 225px

  Testimonial requirements
  Horizontal orientation
  Minimum size: 547px by 342px

  *Needed only if content is provided.*