

Planned giving website customization guide

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- Tax-smart gifts

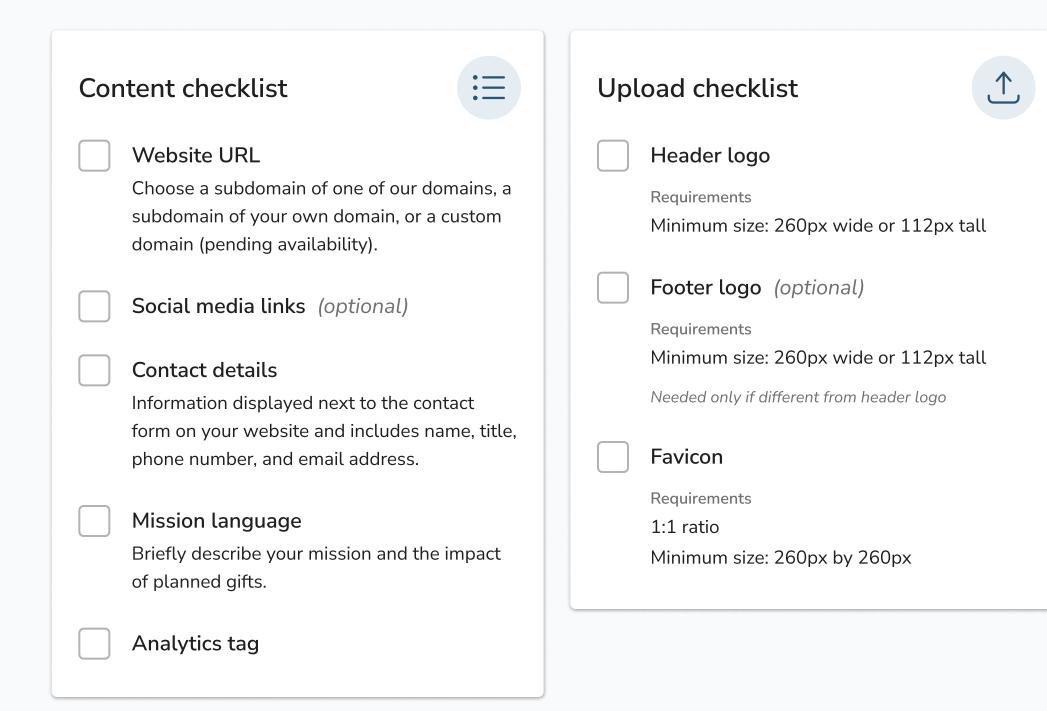
About FreeWill-provided assets

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:

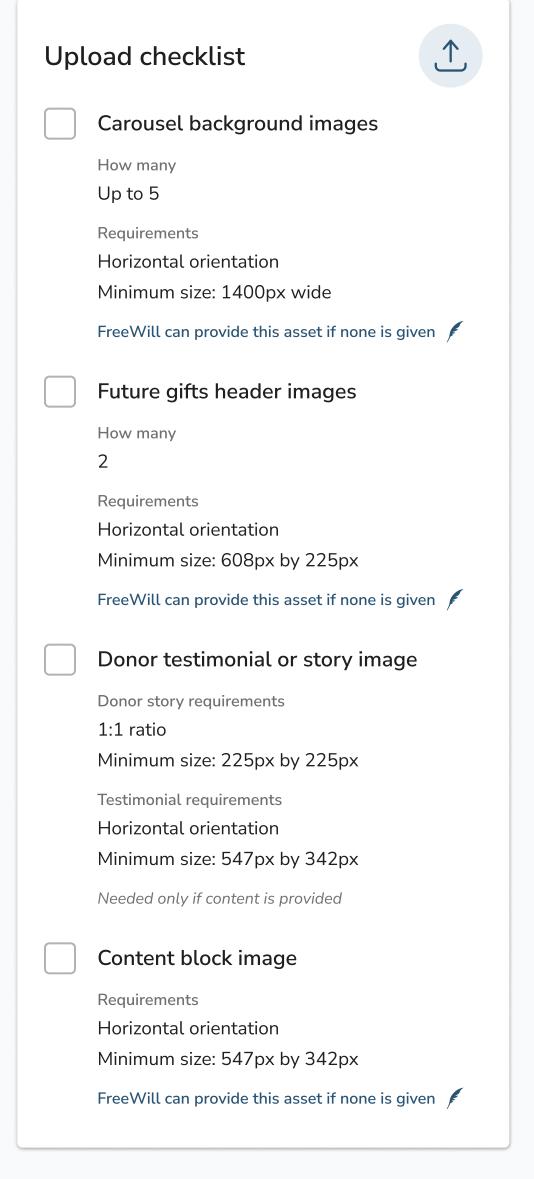


Homepage

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:

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.

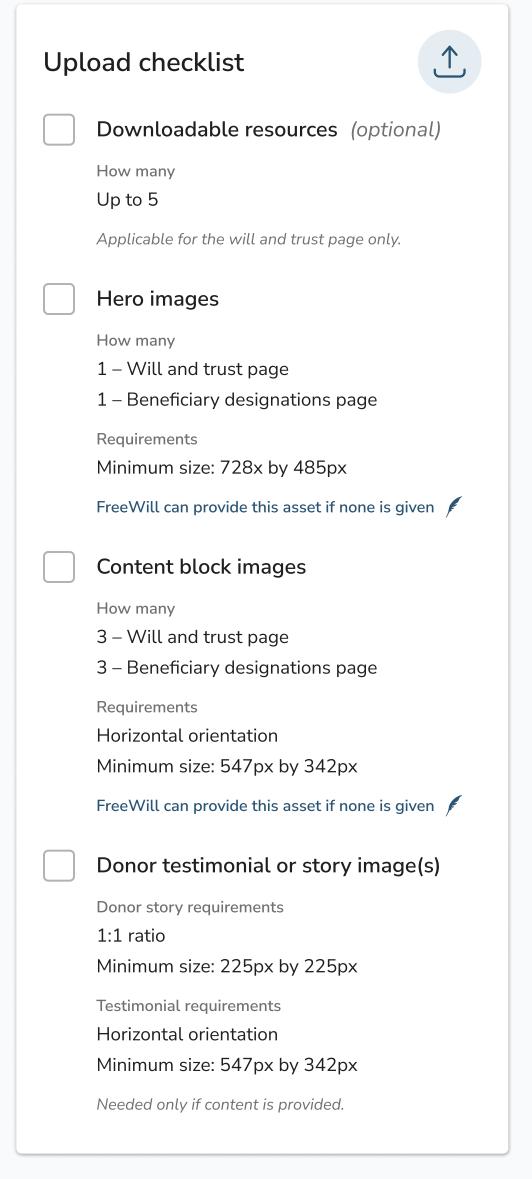


Gifts for the future

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:

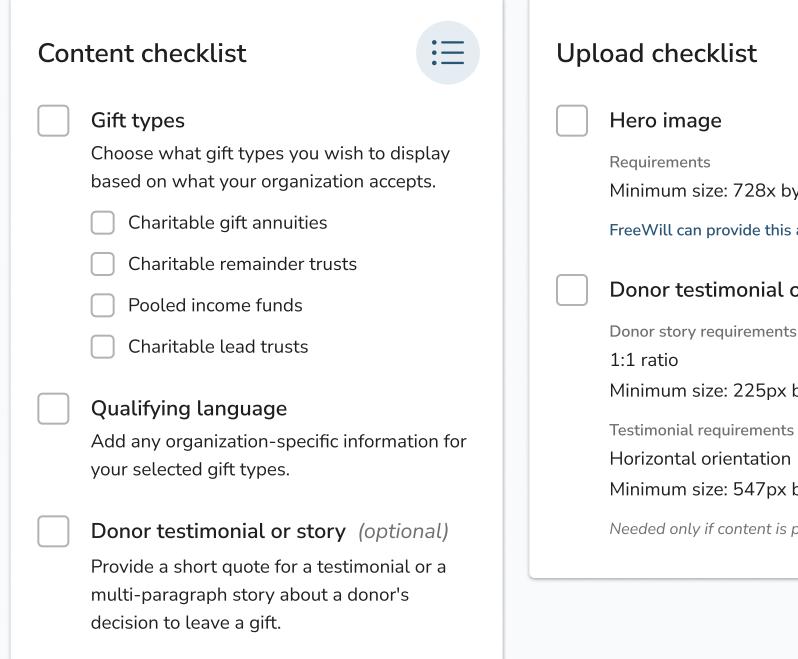
Content checklist Custom FAQs (optional) Add FAQs specific to your organization. How many Up to 5 per page Donor testimonial or story (optional) Provide a short quote for a testimonial or a multi-paragraph story about a donor's decision to leave a gift. How many Up to 1 per page

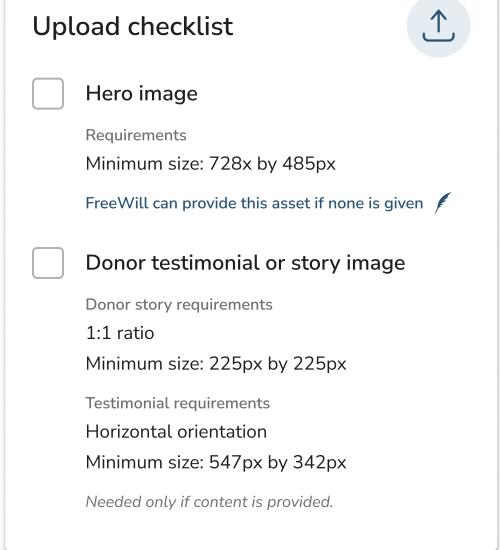


Gifts that pay you back

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:





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:

