Cooperative Baptist Fellowship Foundation

FREEWILL

BEQUEST TEMPLATE PACKET

Prepared for Churches

PRESENTED BY

FreeWill + Cooperative Baptist Fellowship Foundation

2021-2022

FreeWill + Cooperative Baptist Fellowship Foundation

March 2021 Bequest Template Packet for Churches

Below, please find templates for church leaders associated with the CBF Foundation to use in outreach for their individual ministries.

This packet includes:

- *Bequest email template*
- *Bequest website integration template*
- *Bequest Facebook post template*
- *Bequest program/brochure print blurb template*
- *Bequest phone script*

Please note that we have added a tagged URL to each template. *Each time a church sends one of these pieces of outreach, it is critical that they use the associated tagged URL to link to the FreeWill tool, as demonstrated. This will ensure that we can track any gifts that result from this outreach.*

Bequest Email Template

***Tagged URL for this template (when you create outreach based on this template, please hyperlink to this URL as demonstrated below):*

https://www.freewill.com/cbf?utm_source=partner&utm_medium=eblast&utm_campaign=202103_cbf_email_template_churches

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Subject: A resource to protect what you love

Body:

Dear [NAME],

[Short paragraph about history/mission of Church]. Your generosity has helped to [MISSION/IMPACT].

To thank you for supporting the future of [CHURCH NAME], I want to share a resource to protect your own future: an online tool to write your legal will, at no personal cost.

I know this isn't the type of resource you're used to seeing from [CHURCH NAME]. But estate planning is an important task and an easy way to steward all that God has blessed you with. We share this resource as a way for you to protect your family, get peace of mind, and pass on your blessings — just as your support has passed incredible blessings onto [CHURCH].

This **free tool** is a result of our partnership with the Cooperative Baptist Fellowship Foundation who has partnered with FreeWill. FreeWill makes estate planning free and accessible for all, and has been used by over 240,000 Americans to write their free wills.

It can also be used to create an optional legacy gift. Legacy gifts help us renew God's world for generations to come, and cost nothing today. Whether or not you make this gift, know that this resource is completely free to use.

<<link in button>> Claim my free will <<link in button>>
If you have any questions about this resource, please contact [NAME] at [EMAIL].

Many thanks,

[SIGNATURE]

Bequest Web Integration Template

***Tagged URL for this template (when you add website language based on this template, please hyperlink to this URL as demonstrated below):*
https://www.freewill.com/cbf?utm_source=partner&utm_medium=website&utm_campaign=202103_cbf_website_churches
Language about FreeWill is most effective when placed on a Planned Giving page as a way to begin a legacy quickly, or as an option for "Ways to Give."

Below, please find a general FreeWill blurb you can include on your website in the aforementioned places:
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Create your faithful legacy with a gift in your will

Planning a gift in your will for [CHURCH] costs nothing today, and turns your faith into action for generations to come! We have partnered with **FreeWill** to make it simpler than ever to create your faithful legacy.

Create your legal will online in under 20 minutes, and steward all that God has blessed you with as you **establish a legacy in faith.**

Bequest Facebook Post Template

***Tagged URL for this template (when you create outreach based on this template, please include the URL highlighted in yellow).*

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Many of our most dedicated church members have committed to helping us spread God's word for generations to come — without paying anything today. To join them, create a free will and faithful legacy with [CHURCH] today: *https://www.freewill.com/cbf?utm_source=partner&utm_medium=social&utm_campaign=202103_cbf_churches_template_fb*

Bequest Program/Brochure Blurb Template - Print

This template is for a print brochure, program, or handout, so does not have a tagged URL associated with it.

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If you are looking for another way to put your faith into action, consider supporting [CHURCH] without spending anything today! Many of our dedicated ministry members choose to do so by including a **faithful legacy gift in their wills**. This generous gift costs nothing today but ensures that we can continue to renew God's world this year, and in years to come.

Begin your legacy today at **FreeWill.com/CBF**

Bequest Phone Script

This script can guide your conversations with prospective planned/legacy gift donors. This script can be tweaked based on who is making the call.

—

Good morning, my name is [NAME], calling on behalf of [CHURCH]. Do you have time for a quick conversation?

First, I want to take a moment to thank you for your [DONATION/VOLUNTEERING/EVENT ATTENDED/ETC]. Your commitment to putting faith into action inspires us!

FREEWILL

I want to take some time to tell you about our Church's partnership with CBF Foundation that offers us a free online will writing platform called FreeWill. Have you heard of FreeWill or seen any of our previous outreach?

[If yes, include: **"**That's great! As you already know..." and continue below]

FreeWill is an intuitive online platform that allows everyone to write their legally valid will in less than 30 minutes. Everyone needs a will, and FreeWill makes it easy for you to write, update, or start the process. If you have a more complex estate, it can be used to document your wishes before visiting an attorney, which can be a cost saving.

FreeWill can also help you establish a faithful legacy with [CHURCH], by making it simpler than ever to plan a gift in your will. Many donors choose this option because it represents a commitment to to the future of God's Church, without paying a dime today.

Are you interested in using FreeWill or learning more about the opportunity?

If yes: Excellent. If you visit **FreeWill.com/CBF** you can get started on your will and even plan your legacy, if you feel so moved.

If questions about the legacy ask:

Happy to give you some more information! Members of our church who have left legacy gifts have designated the gifts to……. [INCLUDE INFORMATION ABOUT DONORS SUPPORT OF YOUR CHURCH'S WORK – this is an opportunity for you to provide guidance on gift designation such as if your church has an existing endowment fund or examples of ongoing needs that will last into the future such as building maintenance or a general ministry fund]. And a legacy gift is not about writing a check today, it's about committing to spreading God's hope through our church for generations to come. Do you have any questions about the impact of your potential gift?

I know that creating a legacy can be a decision that is made over time, and I would like you to know that you can always go back on FreeWill to make changes if you decide on a gift later on. Also, we are offering FreeWill to all of our supporters, regardless of whether or not they choose to create a legacy.

Thank you so much for your time! I enjoyed speaking with you, [NAME], and if you have any more questions, please feel free to reach out.

If no:

Not a problem, thank you for your time and I hope we can connect at a later time.